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ECONOMIC CONDITIONS IN MONTANA, 1988

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Spring 1989

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## PREFACE

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**Economic Conditions in Montana, 1988** presents an overview of the Montana economy from a statewide perspective, including a brief economic history of Montana from 1880 to the present. The report discusses changes in demographic and economic indicators, possible reasons for the changes, and the influence of the changes on the economy, and briefly describes the jobs outlook for 1989 and 1990. Also, the report details economic conditions in each of 12 regions statewide. Each region is analyzed using data on population, employment, and income. Many of the tables used in the analysis contain information specific to counties.

**Economic Conditions in Montana, 1988** was prepared to provide decision makers with a review of the state's economic circumstances and to make available detailed data and analysis for those seeking a more in-depth understanding of the economic situation in Montana. The report is intended as a tool for policy formation, but is necessarily limited in scope, and should not be construed as an attempt to explain all of the many aspects of Montana's diverse and complex economy.

As with two previous reports on economic conditions in Montana, this study was sponsored by the Governor's Council on Economic Development, which was created by Executive Order No. 15-83.

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Note: Regional definitions used in this report are those established by Executive Order 2-71, dated August 24, 1971, as amended by Executive Order 7-73, dated October 29, 1973. (The 1971 Executive Order placed Sanders County in the Missoula Region; the 1973 Executive Order placed Sanders County in the Kalispell Region.) The regional definitions, or multi-county districts, originated from a study done in 1970-71 by the Montana Department of Planning and Economic Development--Report to the Governor: Proposed Multi-County Districts for the State of Montana (November 1970)--for the purposes of service, administration, planning, and data reporting in the state.

The previous edition of this report, **Economic Conditions in Montana, 1986**, placed Sanders County in the Missoula Region.

ECONOMIC DEFINITIONS

Basic or export industries. Industries that produce goods or services mostly for sale outside the state or region or are influenced by events occurring outside the area. Montana's basic or export industries include agriculture, manufacturing (including wood products, paper, primary metals), mining, heavy construction, railroads, federal government, and nonresident travel. The labor income of persons working in basic industries represents net injection of new funds into an area, creating additional income (in the derivative industries) as those funds are spent and respent.

Derivative industries. Industries that serve the local population. These include retail and wholesale trade, most services, financial institutions, insurance and real estate agencies, transportation companies (except railroads and interstate trucking), construction (except heavy construction), public utilities, and state/local government.

Earnings. Wages, salaries, fringe benefits, net income of self-employed.

Labor income. The labor income of all persons engaged in the current production of goods and services. Does not include corporate profits. Consists mostly of wages and salaries plus the earnings of the self-employed.

Natural population increase. Births minus deaths.

Net migration of population. Net persons moving into or out of an area. Net migration is an excess of those moving in over those moving out. Net outmigration is the reverse.

Nonfarm labor income. The labor income of all persons, except those in agriculture, engaged in the current production of goods and services. Does not include corporate profits. Consists mostly of wages and salaries plus the earnings of the self-employed.

Per capita income. Total personal income from all sources divided by total population. Often used to measure and compare well-being in various areas.

Personal income. The income of residents of an area from all sources. It is measured after the deduction of personal contributions to social security but before the deduction of income and other personal taxes.

Property income. Income from interest payments, dividends on stocks, and rent.

Transfer payments. Social security benefits, certain government pensions, unemployment, compensation, and income maintenance payments such as welfare and food stamps.

^^^

CHAPTER 1

OVERVIEW OF THE MONTANA ECONOMY: HISTORY AND FORECASTS

The Montana economy, as measured by jobs, currently is growing, and jobs have been increasing since late 1986. Chapter 1 outlines employment growth for the years 1987 and 1988, the shift from wage/salary jobs to self-employment in the 1980s and the volatility in job levels. An historical perspective on employment change from 1880 to the present is given, and published forecasts for 1989 and 1990 are summarized.

The Early White Settlement Period, 1880-1920

Montana experienced substantial employment and associated population growth during the early white settlement period of 1880-1920. According to U.S. Census data, employment in 1880 was about 22,000, and by 1920 it had increased approximately 10 fold to 214,000. Total population grew from about 40,000 to around 550,000 as the result of two phenomena: more births than deaths, and more people moved into Montana than moved out resulting in net in-migration. This latter factor relates to employment growth in the state as compared with the nation, as illustrated in Figure 1.1. The remarkable employment growth in Montana resulted in net in-migration of about 310,000 people. The rest of the population growth between 1880 and 1920 (200,000) was a result of the natural increase in population (an excess of births over deaths).

The Period 1920-1980

Except for the decade of the 1970s, this 60-year period was one of slow growth in employment and population. Between 1970 and 1980 growth was moderate, with 13 percent population growth in Montana versus 11 percent nationally.

Employment remained constant between 1920 and 1940, and increased only 37 percent over the 30 year period of 1940-1970, or about 1 percent per year. U.S. employment growth between 1920 and 1970 was much stronger than for Montana (Figure 1.2). Not surprisingly, Montana experienced net out-migration (more people left the state than came) every decade between 1920 and 1970, for a total net out-migration of about 220,000 people. Excluding the 1920s, total population generally did not decline over this period, however, because of the natural increase in population.

The years 1970-1980 represent an oddity in Montana's recent economic history. The decade of the 1970s was the first since 1910-1920 where Montana experienced somewhat higher employment growth than the nation as a whole (34 percent versus 28 percent). And the decade also produced the first net in-migration (33,000) since World War I.

The Period 1980-1990

Employment and population growth in the 1980s has been erratic, and a structural shift from wage/salary jobs to self-employment has occurred. As illustrated by Figure 1.3, the growth in the number of employed persons in Montana between 1979 and 1987 was less than the national average because of a net out-migration of about 29,000 people between 1980 and 1987, most of which occurred after 1984. Total population increased between 1980 and 1985, but has decreased since 1985 because the level of net out-migration has been higher than the excess of births over deaths. Total population was estimated at about 805,000 for 1988 compared with 787,000 in 1980. (Figure 1.5 shows population trends for 1969-1986.)

Structural Change 1979-1987

The U.S. Bureau of Economic Analysis shows that between 1979-87, total jobs in Montana increased by about 14,000. There was a net loss of approximately 11,000 wage/salary jobs, while the number of self-employed increased by roughly 25,000 (all in the non-agricultural sector), representing a substantial employment composition shift. Neighboring states of Idaho and Wyoming also experienced this same shift, as did North Dakota and South Dakota to a lesser degree. Montana's rate of self-employment growth, however, was higher than the average for its contiguous states.

There also was a shift among sectors in Montana within the wage/salary job category. Average earnings (wages/salaries, fringe benefits, net income of the self-employed) per job also changed over the period 1979-87, with 1979 yielding about \$12,000, and increasing to approximately \$16,000 in 1987--a gain of 33 percent. This increase, however, was less than the national rate of inflation over the 1979-87 period (52 percent). Average wages and salaries were \$11,500 in 1979, and grew to about \$16,100 in 1987 (40 percent), but were still less than the rate of inflation. Average net income of the nonfarm self-employed decreased from about \$12,700 to approximately \$11,500 over the same period, partly because of an increase in part-time, self-employed jobs. Average earnings of farm operators fluctuated widely because farm/ranch total net income varied substantially.

Major self-employed job gains occurred in assorted consumer services (such as recreation, repair, and health services)--8,000 jobs; various business services (management consultants, building maintenance, data processing services, and equipment rental)--6,000 jobs; real estate activities (operators/lessors, brokers, and agents)--4,000 jobs; and special trade construction contractors (plumbing/heating, electrical, etc.)--2,000 jobs.

Wage/salary job losses occurred primarily in construction (principally building construction)--7,000 jobs; manufacturing--about 6,000 (wood products--2,600, primary metals processing--2,100, food products--1,400); railroads--4,000; wholesale trade--2,500; federal employment (divided equally between civilian and military jobs)--1,600; communications--1,500; oil and gas extraction--1,400; and membership organizations (includes tribal governments)--1,300.

On the other hand, wage/salary employment increased in other segments of the Montana economy. The largest increase occurred in the private services sector, with a job increase of about 9,000 over the 1979-87 period. Most of the increase was concentrated in health services (5,500 jobs), and in various business services (3,000). Wage/salary jobs in eating/drinking places also increased (2,000).

Total jobs in the agricultural sector declined by about 2,000 jobs (divided equally between wage/salary jobs and self-employed) over the same period. Income earned by agricultural workers (including the self-employed) fluctuated considerably, averaging about \$250 million over the 9-year period. The lowest income years were 1984 and 1985--\$70 million and \$3 million respectively--while 1986 and 1987 (relatively good income years) posted about \$400 million each year.

Volatility of Job Levels in the 1980s

Job levels fluctuated during the 1980s for a number of reasons. Montana suffered from the seven-month national recession in 1980 as well as the five-month recession in 1981 and the recession of 1982. Slower national economic growth in 1985 and 1986 also had some effect.

The volatile effect on jobs at the industry level can be tracked in the oil/gas extraction industry, which is impacted by fluctuating world oil prices. During the 1980s, the Montana industry experienced wide swings in oil/gas jobs with an historical peak in 1981, a 20 percent decline between 1981 and 1982, and a 40 percent decrease from 1984 to 1986 when total employment in most other states was growing. Montana and other states with significant oil/gas extraction sectors declined over this latter time period.

In Montana's case, two additional factors contributed to the 1985 and 1986 decline. One was a statewide drought in 1985, with some areas of Montana suffering dry conditions in the immediate previous years. As a result, Montana's farmers and ranchers experienced net negative income from 1983-1985, reaching an overall loss level of about \$100 million in 1985. Second was job losses associated with several manufacturing plant closures in 1985 and 1986, along with employment declines in other manufacturing industries because new machinery was substituted for labor to compete in national and world markets.

Job Recovery, 1987-1988

Figure 1.4 illustrates the volatility of wage/salary jobs covered by the unemployment insurance program in the 1980s. The graph also shows that wage/salary jobs started to increase at the end of 1986 and continued to rise through the second quarter of 1988 (the last quarter for which data from this series is available). Currently available sample data for the rest of 1988 indicates that the recovery continued.

Timing of Recovery by Major Industry Group

Jobs growth in the private services sector was most notable in leading the overall economic recovery. Employment in this sector essentially increased throughout the 1980s, while jobs in other segments of the Montana economy fluctuated. Retail trade also led the recovery, preceding the general increase by six months, and federal government jobs preceded the overall recovery by several months.

Several broad sectors lagged in their recovery as compared with the Montana economy as a whole. Mining's recovery began in the spring of 1987, partly because oil/gas exploration jobs decline ended, and partly because metal mining jobs increased. The manufacturing sector began its recovery about September 1987, as did construction, although it apparently stalled in 1988. Finally, the combined transportation/utilities industry grew starting in January 1988, because the transportation component increased.

Several segments of Montana's economy also have declined over the same time period. Wholesale trade has declined since the summer of 1981, partly because of the state of oil/gas exploration. Wholesale trade decline in 1987-1988 was less severe than in previous years. State government jobs have declined since the end of 1985, with only a small increase in 1988 related to the hiring of temporary fire fighters. Local government jobs have declined since mid-1986.

Job Changes in Specific Industries, 1986-1988

Table 1.1 shows the changes in wage/salary jobs over the recovery period for specific industries in the non-agricultural portion of the Montana economy. It should be noted that the data in the table understate the recovery for 1987. This understatement results because wage/salary employment declined over 1986 and recovered by the end of 1987 to a level only somewhat higher than that of the beginning of 1986 (as shown in Figure 1.6). Thus, the 12-month average for 1986 and 1987 indicates only a modest increase for 1987 even though growth was sustained once it started at the end of 1986. To partially deal with this technical data problem, the following discussion emphasizes a comparison of 1986 with 1988.

The private services sector experienced the largest job growth between 1986 and 1988, with an increase of 4,800 wage/salary jobs, continuing the growth pattern of earlier in the 1980s. Growth within the services category was primarily in the health and related social services category, various business services, and travel/recreation services including lodging places. Growth also occurred in other travel-related sectors. Eating/drinking places increased by about 700 jobs. Air transportation (included in the "other transportation" category of Table 1.1) also showed a large percentage increase in jobs (roughly 15 percent to 20 percent).

The metal mining industry increased by about 1,000 jobs between 1986 and 1988 largely because a number of new gold mines and one platinum/palladium mine in

Stillwater County opened. The largest new gold mine is the Montana Tunnels project located in Jefferson County. The reopening of the Butte copper mine in mid-1986 also contributed to the growth in metal mining between 1986 and 1988.

The broadly defined declining sectors in 1986-1988 were construction, transportation and public utilities, state/local government, and wholesale trade. With the exception of state and local government, all these industries also experienced declines earlier in the 1980s. All construction categories shared in the decline. The decreases appear to have stopped in 1988, however, as shown in Table 1.1. Railroad transportation and the communications industry were primarily responsible for the decrease in the transportation and utilities sector. Both state and local government jobs decreased over the 1986-1988 period. Most of the decline within wholesale trade was in the durable goods segment, which includes oil field machinery and farm equipment.

Outlook for Jobs in 1989

The Bureau of Business and Economic Research (University of Montana), the Federal Reserve Bank of Minneapolis, and the First Interstate Bank forecast continued growth in nonfarm wage/salary jobs. Forecasts range from no growth to a one percent increase. Estimates, however, may be conservative because they were made prior to a recent upward revision of the historical jobs estimates.

The Bureau of Business and Economic Research projects one percent total jobs growth, or an increase of about 3,000 jobs for 1989. More than half the increase is expected in private services, and other increases are foreseen in forest products and metal mining. No increase is forecasted for government.

Outlook for Jobs in 1990

The forecasted increase in nonfarm wage/salary jobs for 1990 ranges from no increase to an 0.8 percent increase. Most of the increase is projected for private services, and a small decrease is forecasted for wood/paper products.

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Figure 1.1

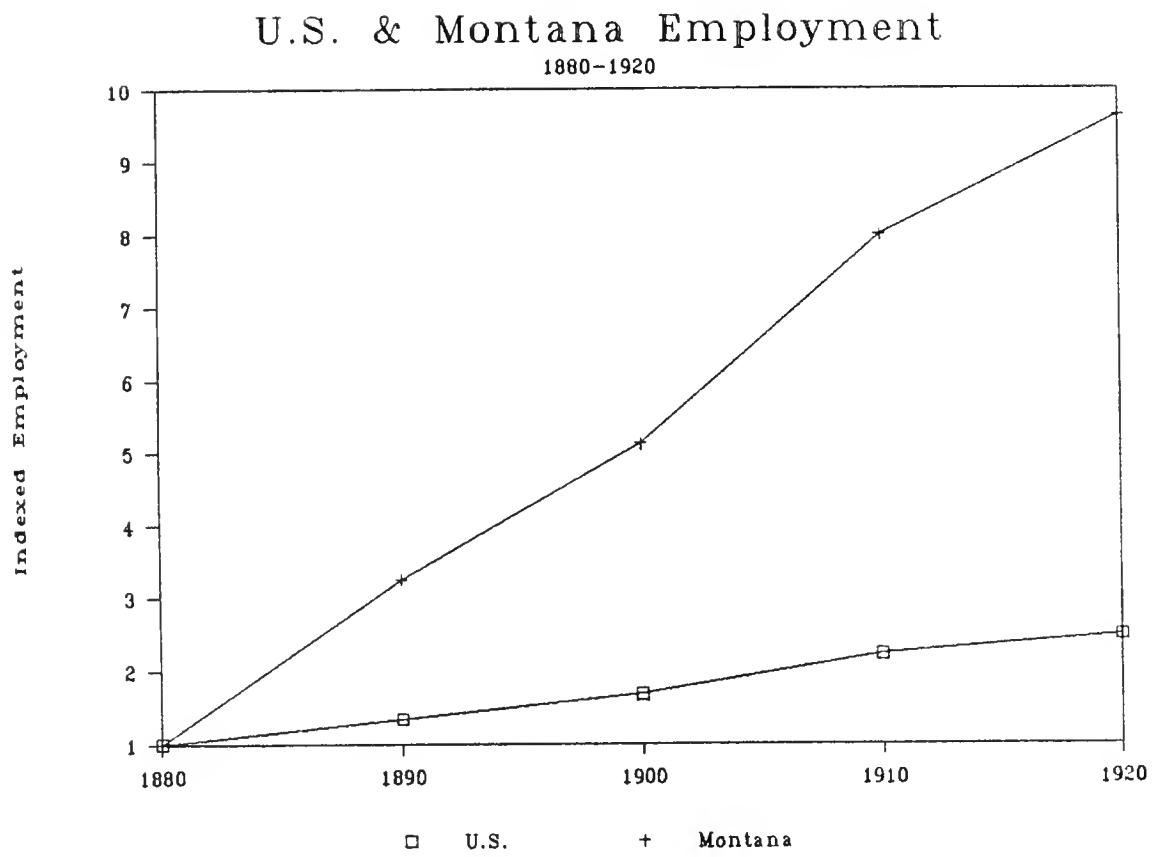
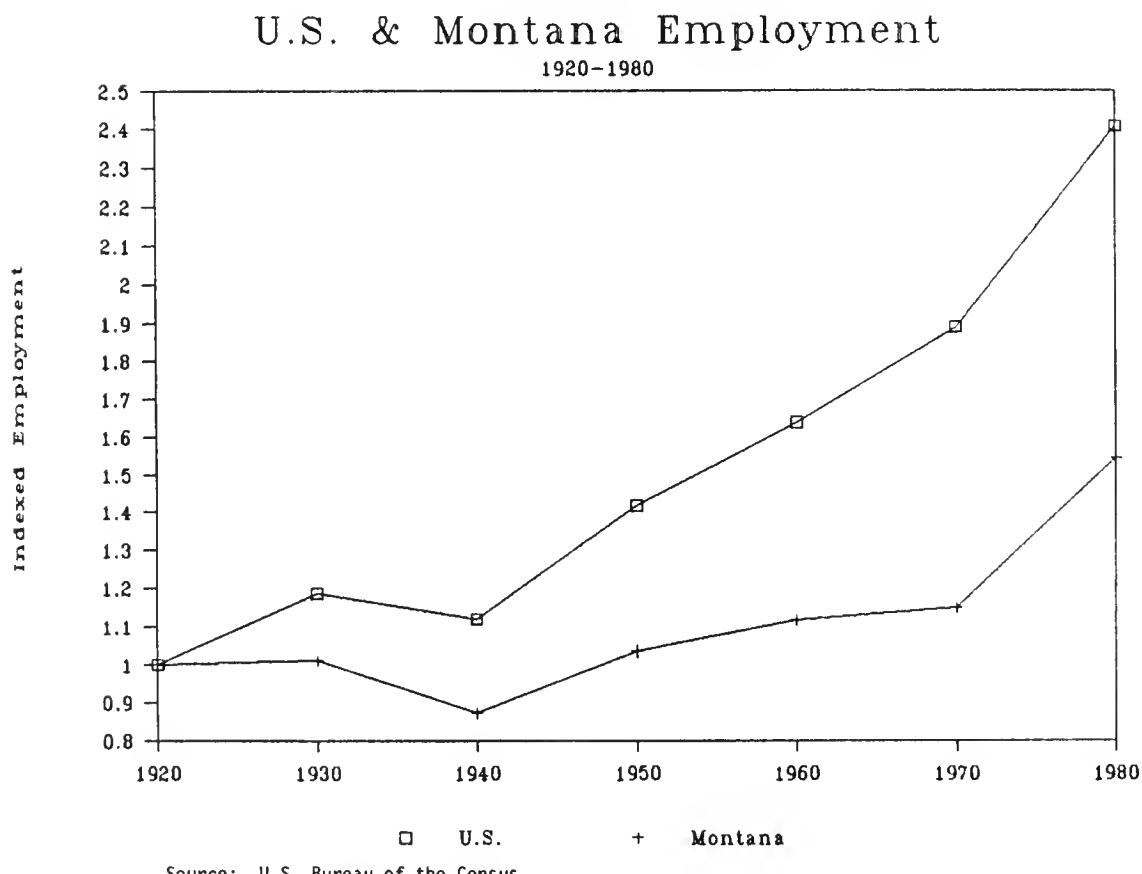
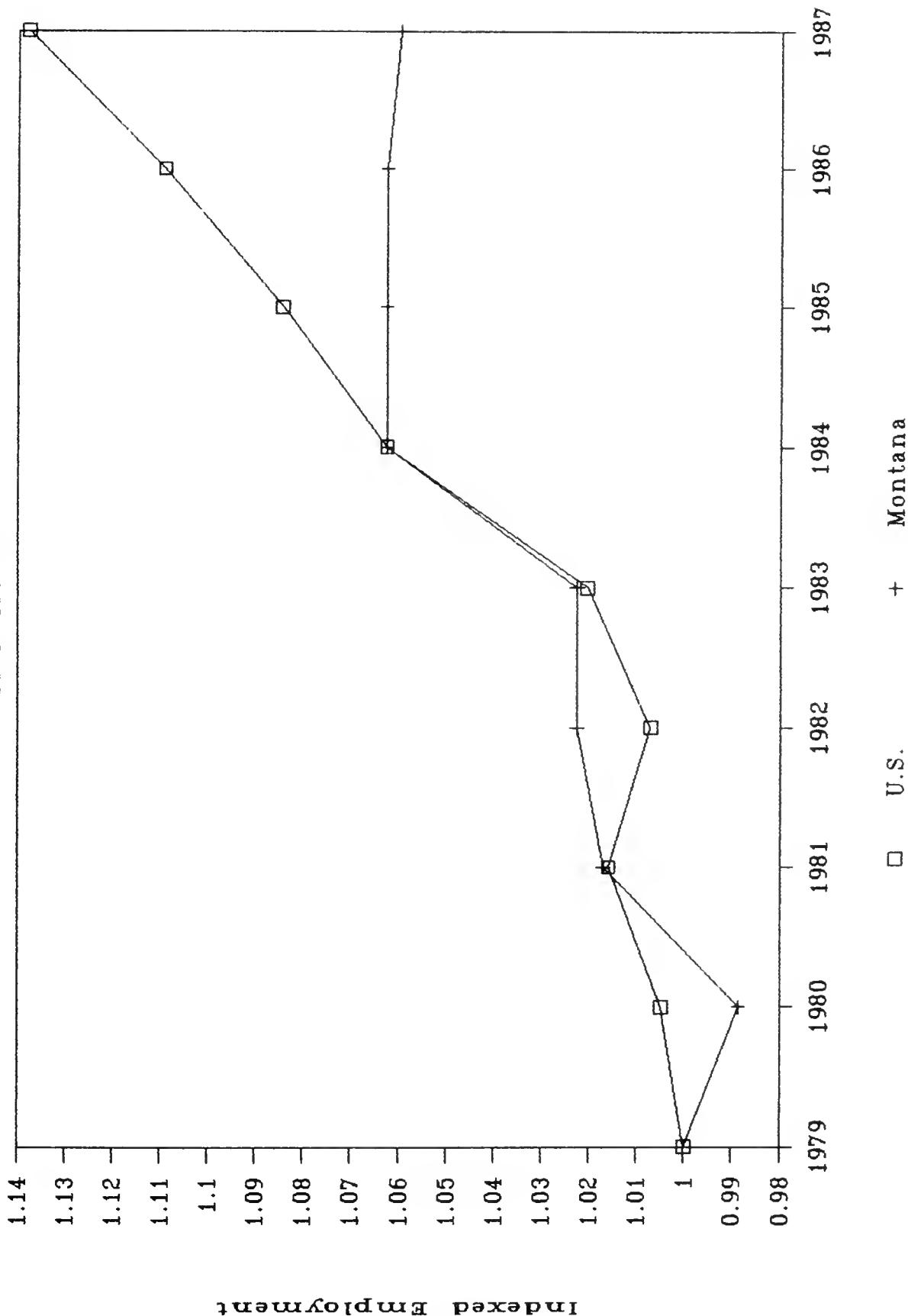


Figure 1.2



# U.S. & Montana Civilian Employment 1979-1987

Figure 1.3



Sources: U.S. Department of Labor, and Montana Department of Labor and Industry.

Figure 1.4

## EMPLOYMENT--MONTANA

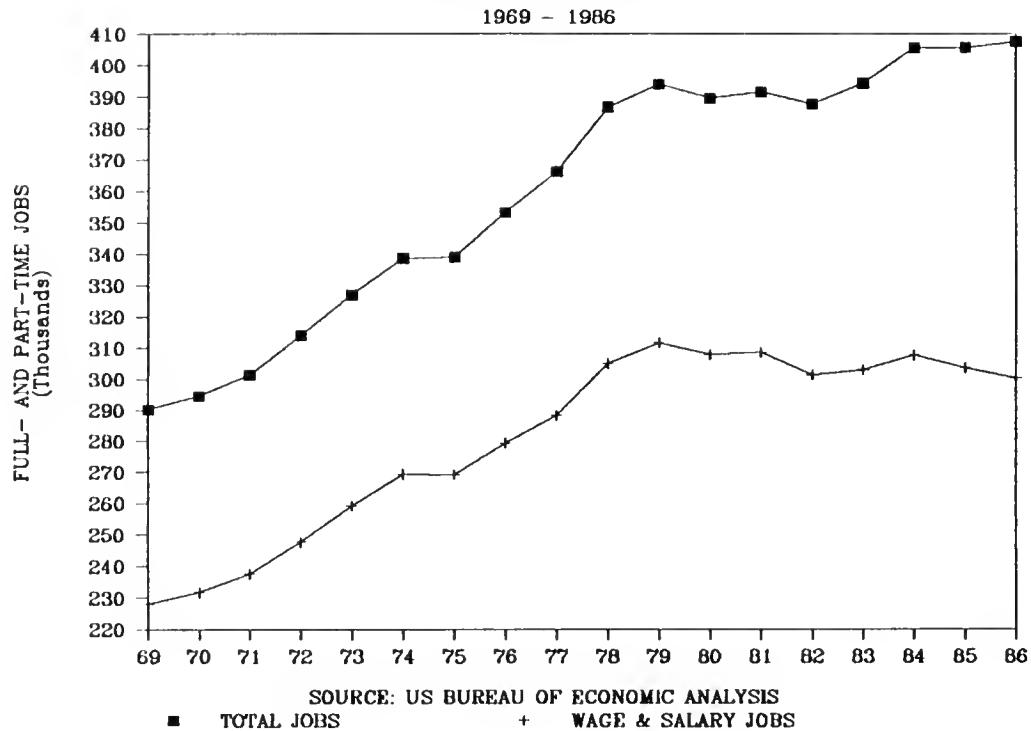


Figure 1.5

## POPULATION--MONTANA

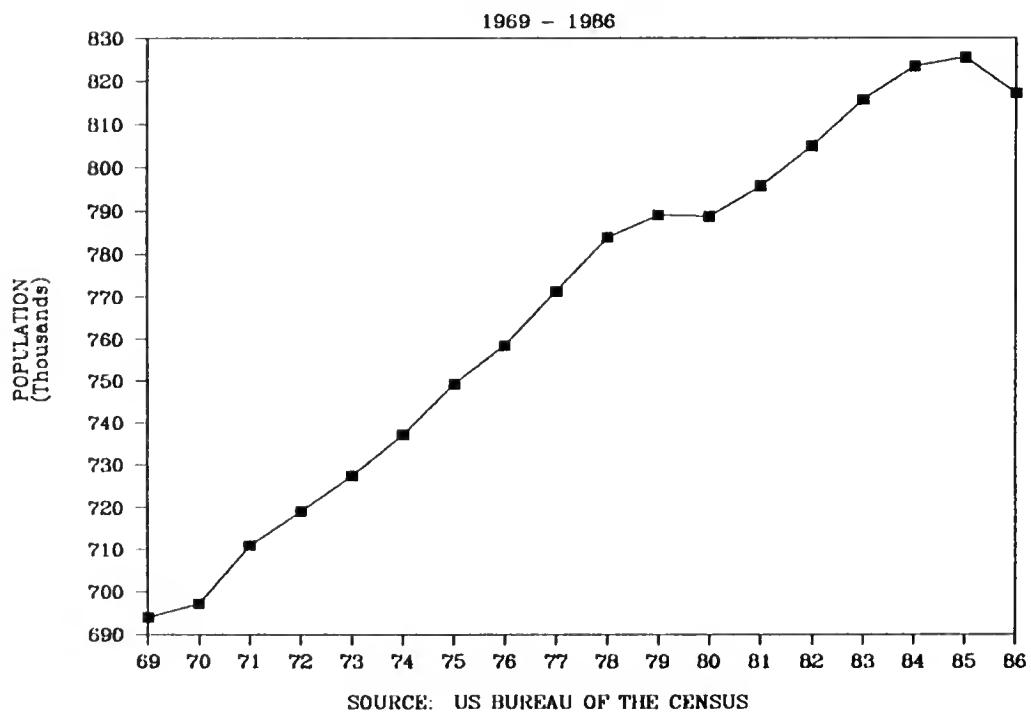
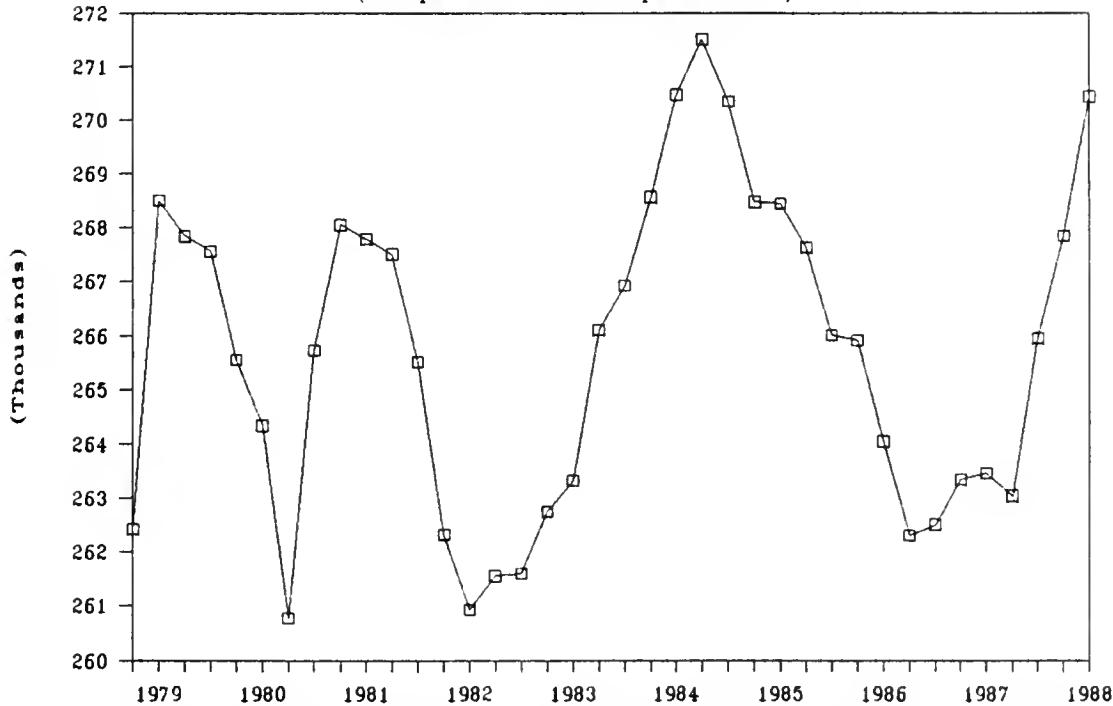


Figure 1.6

# Montana Seasonally Adj Wage/Salary Jobs

(1st quarter 1979-2nd quarter 1988)



Source: Research and Analysis Bureau, Montana Department of Labor and Industry, unpublished data.

Table 1.1

### MONTANA NON-AGRICULTURAL WAGE AND SALARY JOBS, 1986-1988 (Thousands of Jobs)

|                                     | 1986         | 1987         | 1988         | 1987-1988<br>Change | 1987-1988<br>% Change |
|-------------------------------------|--------------|--------------|--------------|---------------------|-----------------------|
| <b>TOTAL NON-AGRICULTURAL JOBS</b>  | <b>275.4</b> | <b>276.0</b> | <b>279.6</b> | <b>3.6</b>          | <b>1.3%</b>           |
| MINING                              | 5.8          | 5.7          | 6.3          | 0.6                 | 10.5%                 |
| Metal Mining                        | 1.2          | 1.7          | 2.2          | 0.5                 | 29.4%                 |
| Oil and Gas Extraction              | 2.3          | 2.0          | 2.0          | 0.0                 | 0.0%                  |
| Coal and Other Non-Metals           | 2.3          | 2.0          | 2.1          | 0.1                 | 5.0%                  |
| CONSTRUCTION                        | 10.2         | 8.7          | 8.7          | 0.0                 | 0.0%                  |
| General Building Contractors        | 2.8          | 2.4          | 2.4          | 0.0                 | 0.0%                  |
| Heavy Construction Contractors      | 2.9          | 2.3          | 2.3          | 0.0                 | 0.0%                  |
| Special Trade Contractors           | 4.5          | 4.0          | 4.0          | 0.0                 | 0.0%                  |
| MANUFACTURING                       | 21.1         | 21.0         | 21.3         | 0.3                 | 1.4%                  |
| DURABLE GOODS                       | 12.8         | 12.9         | 13.1         | 0.2                 | 1.6%                  |
| Lumber and Wood Products            | 8.2          | 8.4          | 8.1          | -0.3                | -3.6%                 |
| Primary Metals Processing           | 1.2          | 1.2          | 1.2          | 0.0                 | 0.0%                  |
| Other Durable Goods                 | 3.3          | 3.3          | 3.8          | 0.5                 | 15.2%                 |
| NON-DURABLE GOODS                   | 8.4          | 8.1          | 8.2          | 0.1                 | 1.2%                  |
| Food and Kindred Products           | 2.8          | 2.7          | 2.7          | 0.0                 | 0.0%                  |
| Printing and Publishing             | 2.4          | 2.4          | 2.5          | 0.1                 | 4.2%                  |
| Petroleum Refining                  | 0.9          | 0.8          | 0.8          | 0.0                 | 0.0%                  |
| Other Non-Durable Goods             | 2.3          | 2.2          | 2.2          | 0.0                 | 0.0%                  |
| TRANSPORTATION AND UTILITIES        | 20.4         | 19.6         | 19.4         | -0.2                | -1.0%                 |
| Railroads                           | 3.7          | 3.4          | 3.3          | -0.1                | -2.9%                 |
| Other Transportation                | 8.1          | 8.0          | 8.2          | 0.2                 | 2.5%                  |
| Utilities                           | 8.5          | 8.2          | 7.9          | -0.3                | -3.7%                 |
| WHOLESALE TRADE                     | 15.4         | 14.8         | 14.7         | -0.1                | -0.7%                 |
| RETAIL TRADE                        | 57.2         | 57.9         | 58.9         | 1.0                 | 1.7%                  |
| General Merchandise and Apparel     | 8.3          | 8.6          | 8.6          | 0.0                 | 0.0%                  |
| Food Stores                         | 6.5          | 8.5          | 8.8          | 0.3                 | 3.5%                  |
| Auto, Dealers and Service Stations  | 7.8          | 7.6          | 7.9          | 0.1                 | 1.3%                  |
| Eating and Drinking Places          | 21.7         | 22.0         | 22.4         | 0.4                 | 1.8%                  |
| Other Retail Trade                  | 11.0         | 11.1         | 11.2         | 0.1                 | 0.9%                  |
| FINANCE, INSURANCE, AND REAL ESTATE | 13.1         | 13.3         | 13.3         | 0.0                 | 0.0%                  |
| PRIVATE SERVICES                    | 62.1         | 65.0         | 66.9         | 1.9                 | 2.9%                  |
| Hotels and Other Lodging Places     | 6.9          | 6.9          | 7.1          | 0.2                 | 2.9%                  |
| Personal Services                   | 3.0          | 2.9          | 3.0          | 0.1                 | 3.4%                  |
| Health Services                     | 21.9         | 23.1         | 23.4         | 0.3                 | 1.3%                  |
| Other Services                      | 30.4         | 32.0         | 33.4         | 1.4                 | 4.4%                  |
| GOVERNMENT                          | 70.2         | 70.0         | 70.1         | 0.1                 | 0.1%                  |
| Federal-Civilian                    | 12.7         | 13.2         | 13.5         | 0.3                 | 2.3%                  |
| State Government                    | 19.4         | 19.0         | 19.1         | 0.1                 | 0.5%                  |
| Colleges and Universities           | 8.8          | 8.6          | 8.6          | 0.0                 | 0.0%                  |
| Other State Government              | 10.6         | 10.3         | 10.5         | 0.2                 | 1.9%                  |
| Local Government                    | 38.0         | 37.8         | 37.5         | -0.3                | -0.8%                 |
| Local Education                     | 22.8         | 22.8         | 22.6         | -0.2                | -0.9%                 |
| Other Local Government              | 15.2         | 15.0         | 14.9         | -0.1                | -0.7%                 |

Sources: Research and Analysis Bureau, Montana Department of Labor and Industry for 1986 and 1987 data; Office of Research and Information Services, Montana Department of Commerce for 1988 data, based in part on published and unpublished information supplied by the Montana Department of Labor and Industry.

Table 1.2 WAGE &amp; SALARY EMPLOYMENT IN MONTANA\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986     | 1987     | CHANGE  | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|----------|----------|---------|-------------------|
| Total Wage and Salary Employment                    |               | 263,662  | 264,285  | 623     | 0.2%              |
| Total Private                                       |               | 201,933  | 202,846  | 913     | 0.5%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 2,910       | E 2,968  | E 58     | E 2.0%  |                   |
| Agricultural Production--Crops ***                  | 01            | 592      | 585      | (7)     | -1.2%             |
| Agricultural Production--Livestock ***              | 02            | 1,200    | 1,205    | 5       | 0.4%              |
| Agricultural Services                               | 07            | 896      | 973      | 77      | 8.6%              |
| Forestry                                            | 08            | 222      | 205      | (17)    | -7.7%             |
| Fishing, Hunting, and Trapping                      | 09            | "0"      | "0"      | "0"     | "0"               |
| Mining                                              |               | 5,800    | 5,767    | (33)    | -0.6%             |
| Metal Mining                                        | 10            | 1,202    | 1,709    | 507     | 42.2%             |
| Coal Mining                                         | 12            | 1,300    | 1,130    | (170)   | -13.1%            |
| Oil and Gas Extraction                              | 13            | 2,275    | 2,008    | (267)   | -11.7%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 1,022    | 919      | (103)   | -10.1%            |
| Construction                                        |               | 10,218   | 8,690    | (1,528) | -15.0%            |
| General Building Contractors                        | 15            | 2,806    | 2,391    | (415)   | -14.8%            |
| Heavy Construction Contractors                      | 16            | 2,939    | 2,304    | (635)   | -21.6%            |
| Special Trade Contractors                           | 17            | 4,472    | 3,994    | (478)   | -10.7%            |
| Manufacturing                                       |               | E 21,149 | E 20,911 | E (238) | E -1.1%           |
| Food and Kindred Products                           | 20            | 2,785    | 2,716    | (69)    | -2.5%             |
| Textile Mill Products                               | 22            | "0"      | "0"      | "0"     | "0"               |
| Apparel and Other Textile Products                  | 23            | 593      | 537      | (56)    | -9.4%             |
| Lumber and Wood Products                            | 24            | 8,235    | 8,358    | 123     | 1.5%              |
| Furniture and Fixtures                              | 25            | 227      | 216      | (11)    | -4.8%             |
| Paper and Allied Products                           | 26            | 857      | 845      | (12)    | -1.4%             |
| Printing and Publishing                             | 27            | 2,418    | 2,415    | (3)     | -0.1%             |
| Chemicals and Allied Products                       | 28            | 656      | 598      | (58)    | -8.8%             |
| Petroleum Refining and Related Industries           | 29            | 861      | 773      | (88)    | -10.2%            |
| Rubber and Miscellaneous Plastic Products           | 30            | 132      | 178      | 46      | 34.8%             |
| Leather and Leather Products                        | 31            | 71       | 48       | (23)    | -32.4%            |
| Stone, Clay, Glass, and Concrete Products           | 32            | 1,042    | 893      | (149)   | -14.3%            |
| Primary Metals Processing                           | 33            | 1,210    | 1,177    | (33)    | -2.7%             |
| Fabricated Metal Products                           | 34            | 571      | 542      | (29)    | -5.1%             |
| Machinery, Except Electrical                        | 35            | 481      | 538      | 57      | 11.9%             |
| Electrical and Electronic Equipment                 | 36            | 165      | 164      | (1)     | -0.6%             |
| Transportation Equipment                            | 37            | 197      | 188      | (9)     | -4.6%             |
| Instruments and Related Products                    | 38            | 131      | 148      | 17      | 13.0%             |
| Miscellaneous Manufacturing Industries              | 39            | 517      | 577      | 60      | 11.6%             |
| Transportation and Public Utilities                 |               | 16,746   | 16,143   | (603)   | -3.6%             |
| Local and Interurban Passenger Transit              | 41            | 1,132    | 1,040    | (92)    | -8.1%             |
| Trucking and Warehousing                            | 42            | 5,568    | 5,314    | (254)   | -4.6%             |
| Water Transportation                                | 44            | 18       | 16       | (2)     | -11.1%            |
| Transportation by Air                               | 45            | 853      | 995      | 142     | 16.6%             |
| Pipelines, Except Natural Gas                       | 46            | 97       | 77       | (20)    | -20.6%            |
| Transportation Services                             | 47            | 507      | 525      | 18      | 3.6%              |
| Communications                                      | 48            | 3,942    | 3,590    | (352)   | -8.9%             |
| Electric, Gas, and Sanitary Services                | 49            | 4,625    | 4,582    | (43)    | -0.9%             |
| Wholesale Trade                                     |               | 15,294   | 15,002   | (292)   | -1.9%             |
| Durable Goods                                       | 50            | 8,079    | 7,879    | (200)   | -2.5%             |
| Non-durable Goods                                   | 51            | 7,214    | 7,122    | (92)    | -1.3%             |
| Retail Trade                                        |               | 57,241   | 57,770   | 529     | 0.9%              |
| Building Materials and Hardware                     | 52            | 2,758    | 2,667    | (91)    | -3.3%             |
| General Merchandise Stores                          | 53            | 5,752    | 6,154    | 402     | 7.0%              |
| Food Stores                                         | 54            | 8,509    | 8,508    | (1)     | -0.0%             |
| Automotive Dealers and Service Stations             | 55            | 7,730    | 7,754    | 24      | 0.3%              |
| Apparel and Accessory Stores                        | 56            | 2,500    | 2,444    | (56)    | -2.2%             |
| Furniture and Home Furnishings Stores               | 57            | 2,156    | 2,163    | 7       | 0.3%              |
| Eating and Drinking Places                          | 58            | 21,803   | 21,944   | 141     | 0.6%              |
| Miscellaneous Retail                                | 59            | 6,030    | 6,134    | 104     | 1.7%              |
| Finance, Insurance, and Real Estate                 |               | 13,073   | 13,163   | 90      | 0.7%              |
| Banking                                             | 60            | 4,987    | 4,808    | (179)   | -3.6%             |
| Credit Agencies other than Banks                    | 61            | 1,834    | 1,861    | 27      | 1.5%              |
| Security, Commodity Brokers, and Services           | 62            | 577      | 604      | 27      | 4.7%              |
| Insurance Carriers                                  | 63            | 1,262    | 1,335    | 73      | 5.8%              |
| Insurance Agents, Brokers, and Services             | 64            | 1,754    | 1,726    | (28)    | -1.6%             |
| Real Estate                                         | 65            | 2,420    | 2,536    | 116     | 4.8%              |
| Combined Real Estate, Insurance, Etc.               | 66            | 96       | 96       | 0       | 0.0%              |
| Holding and Other Investment Offices                | 67            | 141      | 193      | 52      | 36.9%             |
| Services                                            |               | 59,406   | 62,363   | 2,957   | 5.0%              |
| Hotels and Other Lodging Places                     | 70            | 6,881    | 6,952    | 71      | 1.0%              |
| Personal Services                                   | 72            | 2,951    | 2,908    | (43)    | -1.5%             |
| Business Services                                   | 73            | 6,297    | 6,815    | 518     | 8.2%              |
| Auto Repair, Services, and Garages                  | 75            | 2,024    | 1,984    | (40)    | -2.0%             |
| Miscellaneous Repair Services                       | 76            | 855      | 956      | 101     | 11.8%             |
| Motion Pictures                                     | 78            | 600      | 558      | (42)    | -7.0%             |
| Amusement and Recreation Services                   | 79            | 2,348    | 2,547    | 199     | 8.5%              |
| Private Health Services                             | 80            | 21,883   | 23,457   | 1,574   | 7.2%              |
| Legal Services                                      | 81            | 1,950    | 2,088    | 138     | 7.1%              |
| Private Educational Services                        | 82            | 1,808    | 1,870    | 62      | 3.4%              |
| Private Social Services                             | 83            | 4,334    | 4,740    | 406     | 9.4%              |
| Museums, Art Galleries, Etc.                        | 84            | 93       | 104      | 11      | 11.8%             |
| Membership Organizations Including Tribal Gov't     | 86            | 4,204    | 4,109    | (95)    | -2.3%             |
| Private Households                                  | 88            | 327      | 355      | 28      | 8.6%              |
| Engineering, Accounting, and Other Services         | 89            | 2,843    | 2,914    | 71      | 2.5%              |
| Non-Classifiable                                    | 99            | 71       | 37       | (34)    | -47.9%            |
| Government                                          |               | 61,729   | 61,439   | (290)   | -0.5%             |
| State                                               |               | 15,589   | 15,306   | (283)   | -1.8%             |
| Local                                               |               | 33,469   | 33,008   | (461)   | -1.4%             |
| Federal                                             |               | 12,670   | 13,124   | 454     | 3.6%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

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## CHAPTER 2

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### ECONOMIC AND DEMOGRAPHIC CONDITIONS THROUGHOUT MONTANA

Chapter 2 details Montana's economic and demographic conditions by considering the state as a whole and as an amalgamation of 12 different economic regions. The regions, shown in Figure 2.1, are composed of three to six counties that to some extent share common economic, geographic, and demographic characteristics. An extensive analysis of employment, population, and income is provided for Montana and each of the 12 regions, including an historical perspective and recent trends.

Throughout the chapter, several standards are maintained. All dollar figures are inflated to constant 1987 dollars to remove any inflation-caused distortions. Also, income and employment data from the U.S. Bureau of Economic Analysis are taken from the latest available county series (April 1988), while statewide numbers used in Chapter 1 are from a revised series (August 1988). Total county jobs data for 1987 were unavailable by two digit industry code when this chapter was written, but wage/salary jobs data are used. Finally, whenever rankings are listed for regions (1-12) or counties (1-56), the rank of "first" corresponds to "best." Thus, the region with the highest total personal income ranks first, as does the region with the lowest unemployment rate.

#### STATEWIDE OVERVIEW

The following overview of the Montana economy discusses changes in demographic and economic indicators, possible reasons for the changes, and the influence of the changes on the economy. The 12 regions are compared and contrasted; regional detail is presented later. As with the sections devoted to each individual region, this section is divided into three major parts: labor force, population, and income.

#### LABOR FORCE

##### Jobs and Job Growth

In 1986, Montanans held about 400,000 jobs, representing the peak of general job growth since 1969 (Table 2.1 and Figure 1.4). However, several exceptions to the job growth trend exist. First, the national recession of 1975 resulted in a decline in jobs in many regions throughout the state, causing the total number of jobs in Montana to remain approximately constant for that year. Second, a strong recession occurred in most regions in 1980, producing a general decline in both total jobs and wage/salary jobs through 1982.

Finally, although the total number of jobs in Montana has increased since 1983, wage/salary jobs declined in 1985 and 1986 (Table 2.2) before increasing once again in 1987 (Table 2.3). The general exception to this phenomenon was the energy-rich eastern third of Montana. Jobs for this area peaked around 1981 (primarily because of the peak in the world price of crude oil) and have declined since that time.

No region dominates the Montana economy, although the Billings Region and the Great Falls Region, (the state's two largest employing regions) together account for more than 30 percent of the state's total jobs. Diversity in both jobs distribution and growth is a basic characteristic of Montana, as shown in Figures 2.3 and 2.4. The Great Falls Region was the state's largest employer in 1969, but from 1969 to 1986 its share of jobs has declined. During the same time, the Billings Region grew to hold the leading position for total jobs.

Table 2.4 displays the growth rates of total jobs for Montana and its regions. The annual average growth rate for Montana between 1969 and 1986 was 2.4 percent, equalling the average growth rate for the nation. Growth since 1979, however, was much slower in the state than in the nation; Montana's jobs grew at an average rate of 0.5 percent per year for a total increase of 3.4 percent, while jobs in the nation increased by 1.9 percent per year for a total increase of 13 percent.

Comparing Table 2.4 with Figures 2.3 and 2.4 verifies that regions growing faster than the statewide average increased their total job share in the state. These regions (in descending order of annual growth rates) were Bozeman, Helena, Missoula, Billings, and Kalispell. Regions that experienced a declining share of total jobs between 1969 and 1986 were Miles City, Havre, Great Falls, Glendive-Sidney, Lewistown, Glasgow-Wolf Point, and Butte. Table 2.1 shows the number of jobs in Montana's regions between 1979 and 1986. The jobs decline in the Lewistown, Glasgow-Wolf Point, Great Falls, Butte, Glendive-Sidney, and Havre regions is particularly noticeable (Figure 2.4). Jobs in the other regions increased, and the rate of increase was below the statewide average only in the Miles City Region. Exact percentages may be found in Table 2.4.

Table 2.3 shows growth in wage/salary jobs at the state, region, and county level between 1986 and 1987. The small increase of 623 jobs, however, understates the recovery in 1987 because the numbers are yearly averages (specifically, declines during 1986 tend to "average out" 1987 growth). Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs actually increased by nearly 3,600 jobs or 1.4 percent.

The regional recovery distribution, at least in its initial stages, is uneven. Table 2.3 reveals that only four of the 12 regions experienced a significant increase in wage/salary jobs: Kalispell, Helena, Missoula, and Butte. Declines continued in all of the other regions except the Great Falls Region, which increased by 0.2 percent, the same as the state's rate.

## **Self-Employment**

One of the most outstanding features of Montana's labor force is the vigorous self-employment growth that has occurred, especially since 1979. Historically, self-employment in the state has accounted for a larger share of total jobs than the national average, mainly because of the importance of agriculture to the state economy. For instance, in 1969, self-employment in Montana represented 21 percent of all jobs, compared to 12 percent nationally. Strong self-employment growth boosted these statistics to 26 percent and 15 percent in 1986 for the state and the nation respectively. But as Table 2.5 shows, nearly all of the state's increase has occurred since 1979 with the decline of the percentage of total jobs held by wage/salary employees. In addition, self-employment in agriculture has declined since 1969. Therefore, the growth was in nonfarm self-employment.

In 1986, more than 107,000 jobs were held by the self-employed, accounting for 26 percent of all jobs in the state. Figure 2.5 shows that most of the self-employed held jobs in services and agriculture, which together accounted for 56 percent of the state's self-employment. Finance/insurance/real estate, along with retail trade, accounted for another 25 percent, while 10 percent of the self-employment was in construction. Transportation and public utilities made up 4 percent, and manufacturing, mining, and wholesale trade together constituted the remaining 4 percent.

The importance of the self-employed to the Montana economy is evident in Figure 2.2 and Table 2.5. As Figure 2.2 indicates, between 1984 and 1986, wage/salary jobs decreased. During this same period, however, total jobs increased slightly because of the steady growth of self-employment. Table 2.5 recounts this growth between 1979 and 1986. Several of Montana's regions posted enormous increases in self-employment, led by an increase of nearly 55 percent in the Helena Region.

Although the reasons for dramatic growth in self-employment are not entirely clear, several factors are apparent. First, the growth represents, in part, a change in work force preference. In recent years, the entrepreneurial challenge appears to have piqued the minds of more individuals. Second, with wage/salary jobs declining, those who wish to continue to live in Montana often must find an alternative source of employment. Finally, the data may overstate the growth in self-employed jobs to some extent.

## **Growth by Economic Sector**

Figure 2.6 portrays the sectoral breakdown of Montana's jobs for 1986 and 1969. As is evident from the first pie chart, services, government, and retail trade were the major employers in 1986, accounting for more than 60 percent of all jobs in the state. In addition, agriculture, finance, insurance, and real estate, transportation/public utilities, manufacturing, and construction each contributed significant shares, while wholesale trade and mining each accounted for less than 5 percent of the state's total jobs.

Sectoral jobs distribution generally reflects the national jobs distribution.

A few key differences, however, are present. First, manufacturing is much more important in the national economy, representing 15.4 percent of all jobs, versus only 5.8 percent in Montana. Government and agriculture appear to make up for this difference, accounting for 18.2 percent and 9.3 percent of Montana's jobs, respectively, as compared with only 15.5 percent and 3.6 percent of the nation's jobs. A higher share of employment applied to government jobs, however, is typical for rural, sparsely populated states across the nation.

Comparing the two pie charts provides insight into another important change in Montana's economy: the decline of traditional goods-producing sectors and the growth of service-oriented sectors. With the exception of construction, all goods-producing sectors experienced a decline in the share of total jobs between 1969 and 1986, with the largest decline occurring in agriculture. In contrast, shares of the service-oriented sectors increased (except for government, transportation/public utilities), with the private service sector rising from 17.6 percent to 25 percent of total jobs. These general changes reflect a nationwide shift toward the service industries.

The remainder of this section details the changes in each major economic sector since 1969.

**Agriculture** (including forestry), historically a key industry in Montana, accounted for 9.3 percent of total jobs in 1986, down from 13.8 percent in 1969. Production agriculture, the overwhelmingly dominant industry in this sector, experienced a large decrease in jobs between 1969 and 1986, contributing to the decline of the entire sector. Actual crop and livestock production grew, however, because of increased productivity through the use of better technology, for example. Jobs in agricultural services (such as farm management and contract labor, crop dusting and spraying, packing and shipping of fruits and vegetables) experienced job growth, as did forestry. Logging and other processing operations are discussed with manufacturing.

**Mining** represented 1.8 percent of total jobs in 1986 at the state level, (down from 2.4 percent in 1969) compared with a figure of 0.9 percent at the national level. The 1970s saw strong growth in the mining industry, with wage/salary jobs increasing by 22 percent, mainly because of extensive growth in coal mining and oil/gas extraction. Large reductions in metal mining employment, however, (mainly in the Butte Region) took place, and partially offset the growth of the other two industries. As a sector, mining continued to grow into the 1980s, peaking in 1981. Between 1981 and 1986, much of this growth reversed, with both oil/gas extraction and metal mining suffering large job losses while employment in the coal mining industry remained steady until 1987.

The non-metallic minerals sector (excluding fuels) grew during this period, primarily because of increased talc production. In terms of net growth between 1969 and 1986, wage/salary jobs in coal mining grew by 1,200, mining of non-energy non-metals by 300, oil/gas extraction remained relatively unchanged, and metal mining lost 2,200 wage/salary jobs (66 percent). Consequently, the industry as a whole declined by 9 percent, or more than 500

wage/salary jobs. Because of offsetting growth in self-employment, however, total jobs actually increased slightly between 1969 and 1986. In 1987, wage/salary jobs continued to decline in this sector, despite the strong recovery of metal mining. Coal mining, oil/gas extraction, and other non-metallic mineral mining all posted large declines (Table 2.6).

Construction accounted for 5.3 percent of the state's total jobs in 1986, equal to the nationwide average share and up slightly from a 1969 level of 5 percent. Between 1969 and 1978 total jobs in this sector increased by 73 percent, peaking in 1978. This increase resulted from growth in general building construction and special trade construction (such as electrical work, carpentry, and concrete work). At the same time, heavy construction declined substantially in wage/salary employment. Total jobs grew slightly, however, because of increases in self-employment. Between 1978 and 1986, wage/salary jobs declined in all construction sectors, and the only industry to post even a slight increase in total jobs was special trade construction. Over the entire period, and despite a 31 percent decline in total jobs in heavy construction, the construction industry grew by over 7,000 jobs, or 48 percent. Much of this growth was created by increases in self-employment. In 1987, wage/salary employment declined 15 percent (Table 2.6). It is important to note, however, that in 1986, self-employment accounted for approximately one-half of the total number of jobs in this sector. Thus, part of this wage/salary job loss could reflect a shift from wage/salary construction jobs to self-employment.

Manufacturing accounted for 5.8 percent of total jobs in Montana in 1986, compared with 15.4 percent for the nation and down from 8.8 percent in 1969 (for a decline of more than one-third). A similar decline in manufacturing's share of total jobs was experienced nationally. Historically, this sector was dominated by three major industries in Montana: lumber/wood products, food/kindred products, and primary metals processing. Recently, printing/publishing and stone/concrete products also accounted for significant employment in this sector.

Although the 1970s witnessed strong growth in lumber/wood products, growth for manufacturing as a whole was less impressive, mainly because of declines in primary metal processing. Employment declines also were widespread in the 1980s, with the exception of slight growth in the apparel, paper, and furniture industries.

In terms of net growth from 1969 to 1986, lumber/wood products lost nearly 700 wage/salary jobs (8 percent), food/kindred products lost over 1,500 wage/salary jobs (36 percent), and primary metals processing lost nearly 3,400 jobs (74 percent). Overall, wage/salary jobs in manufacturing fell by almost 3,000 jobs, for a loss of 12 percent. An increase of more than 1,000 self-employment jobs only partially compensated for this loss. A similar but smaller decline was experienced at the national level, but because of increases in employee productivity, production actually increased in many manufacturing industries throughout the state and the nation, particularly the lumber/wood products industry in Montana. Table 2.6 presents the performance of manufacturing in 1987, when wage/salary jobs again declined. However,

wage/salary employment in lumber/wood products actually grew during 1987, and declines in the other major industries were fairly small, with the exception of stone and concrete products.

**Transportation/public utilities** accounted for 6.2 percent of the total number of jobs in Montana in 1986, versus 4.7 percent of jobs nationwide and down from 6.5 percent in 1969. All major industries experienced significant growth throughout the 1970s. During the 1980s, however, much of this growth was reversed. Between 1969 and 1986, railroad transportation declined by 2,400 wage/salary jobs (38 percent). But at the same time, trucking/warehousing, electric/gas/sanitation, and communications all experienced large increases. As a whole, the sector grew by over 3,500 wage/salary jobs (21 percent) between 1969 and 1986, although the sector lost about 2,700 jobs during the 1980s. An increase of 1,700 self-employed jobs did not fully compensate for this decrease. Another decline in wage/salary jobs in the sector, with communications and trucking/warehousing posting the largest losses, occurred in 1987 (Table 2.6).

**Wholesale trade** accounted for 4 percent of total jobs in 1986, less than the national average of 4.9 percent, but up from 3.6 percent in 1969. Performance during the 1970s and early 1980s was exceptionally strong, with the sector gaining nearly 9,000 jobs (83 percent) between 1969 and 1981. After a peak in 1981, total jobs in wholesale trade declined by about 3,000 jobs by 1986. In 1987, declines continued, as shown in Table 2.6. Recent performance of this sector is related to declines in oil/gas extraction since 1981, partly because of financial stress in the agricultural sector, and partly because of slow population growth in the 1980s.

**Retail trade** accounted for 17.6 percent of the total number of jobs in the state in 1986, slightly above the nationwide figure of 16.4 percent and up from 16.9 percent in 1969. Between 1969 and 1979, all portions of the retail trade sector experienced strong growth, especially eating/drinking places. Much of this growth continued through 1984. By the 1984-1986 period, however, many industries were experiencing a slight decline, including eating/drinking places and building materials/hardware. The retail trade sector also declined by about 1,600 jobs, or 2 percent. As a whole, however, the 1969-1986 period was one of strong growth, with total jobs increasing by nearly 23,000 (over 12,000 of this increase was in eating/drinking places), for a change of 47 percent. Growth returned once again in 1987, as shown in Table 2.6, and the sector increased by about 500 wage/salary jobs. General merchandise stores contributed most of the increase, along with eating/drinking places. Declines came in building materials/hardware and apparel/accessory stores.

**Finance/insurance/real estate (F.I.R.E.)** accounted for 6.8 percent of total jobs in Montana in 1986, compared to 7.6 percent nationwide and up from 4.4 percent in 1969. Between 1969 and 1986, this sector experienced strong growth, and total jobs increased every year, growing from 13,000 in 1969 to 28,000 in 1986, an increase of 116 percent. During the same period, wage/salary jobs grew from 8,100 to 13,800 for a change of 71.3 percent.

Not surprisingly, by 1986, more than half of the jobs in this sector were classified as self-employment, nearly all of which were in the real estate industry. Thus, considering only the wage/salary jobs shown in Table 2.6 most certainly understates the percentage growth of this sector between 1986 and 1987 as well as the distribution of jobs within the sector's industries. Nevertheless, since wage/salary jobs actually increased in 1987 and self-employment has been growing strongly in this sector in recent years, it is safe to say that 1987 was a year of growth for total jobs in this sector.

Two major exceptions to the 1980s general job growth pattern exist. The banking/credit institutions industry peaked in 1981, and the insurance carriers industry declined between 1981 and 1986, but increased in 1987.

Services accounted for 25 percent of total jobs in Montana in 1986, slightly less than the nationwide level of 25.6 percent, but up markedly from a 1969 level of 17.6 percent. Between 1969 and 1986, total jobs in this sector increased from about 51,000 to 102,000, or about 100 percent. Much of this increase was in self-employment, which accounted for one-third of the total jobs in this sector in 1986. Growth in wage/salary jobs during this period also was strong, particularly in private health services, the sector's largest employing industry. Other industries experiencing strong growth included private social services, business services, and hotels/lodging places. In the 1980s, growth has been strongest in business services, although the other industries generally have continued to grow. A significant exception to this growth is membership organizations, and most of the decline in this category has been in tribal organizations. Table 2.6 displays the strong growth that again characterized the service sector in 1987, when wage/salary jobs increased by 5 percent.

Government (federal, state, and local) accounted for 18.2 percent of total jobs in Montana in 1986, more than the national average of 15.5 percent, but down from 21 percent in 1969. A relatively high share of government jobs is typical of rural, sparsely populated states. Growth in government (especially at the state and local levels) during the 1970s was strong, and total government jobs peaked in 1978 despite declines in the military component after 1974. Between 1979 and 1986, declines in civilian and military federal government along with state government caused the total number of government jobs to decline. Jobs in local government grew slowly over this period. In 1987, losses in state and local government more than offset moderate growth in the federal component. As a result, jobs in this overall sector declined slightly in 1987, as detailed in Table 2.6.

### Unemployment Rate

The unemployment rate for Montana generally has increased since 1969, as shown in Table 2.7 and Figure 2.7, following a nationwide trend. National recessions in 1974-1975 and 1980-1982 (Figure 2.7) intensified the increase. An unemployment rate of 7.4 percent in 1987 matches the post 1980-1982 recession low that occurred in 1984.

A qualitative relationship between the unemployment rate and the number of total jobs in the state held between 1970 and 1986. Comparing Figure 1.4 and Figure 2.7 shows that in years of national or statewide recession, growth in total jobs slowed or was negative while the unemployment rate increased, as in 1975. The strong recession of 1980-1982 produced stagnating or declining job growth and very high unemployment rates. Between 1982 and 1984, job growth returned, and the large jumps in the unemployment rate slowed in 1983 and then reversed in 1984. In 1985 and 1986, when the state experienced a recession, wage/salary jobs declined while growth in total jobs slowed, and the unemployment rate once again climbed upward. In contrast, the decline in the unemployment rate that occurred in 1987 was associated with an increase in wage/salary jobs, providing further support for this relationship.

Unemployment rates throughout the state varied greatly in 1987, from the low unemployment rate of 6.3 percent in the Helena and Bozeman regions to the high unemployment rate of 8.8 percent in the Kalispell Region (the result of the seasonal lumber/wood products industry). County level unemployment varied greatly, with a state low in McCone County of 2.8 percent, and a state high in Big Horn County of 13.6 percent. An overview of Montana's 1987 unemployment rates appears in Figure 2.8.

## POPULATION

Population peaked in Montana in 1985 at 825,000 persons before declining to 809,000 in 1987 (Figure 2.10). Table 2.8 presents an historical look at Montana's population from 1890 to 1987. Between 1890 and 1920, population growth was exceptional, with several regions (Butte, Lewistown, and Miles City) reaching their peak. The period between 1920 and 1950 produced modest growth throughout the state, although growth varied substantially by region. Population declined in the Butte, Glasgow-Wolf Point, Glendive-Sidney, Havre, Lewistown, and Miles City regions. Growth was low to moderate in the rest of the state, with the exception of strong growth in the Kalispell Region.

The decades of the 1950s and the 1970s registered above average population growth, although the 1960s showed slow growth. Most of the fastest growing regions (Bozeman, Helena, Billings, and Missoula) showed strong growth around 1950, with the exception of the Kalispell Region. At the same time, the primarily agricultural regions of Glasgow-Wolf Point, Glendive-Sidney, Havre, Lewistown, and Miles City experienced weak growth or even population decline after 1950. Population in the Butte Region continued to decline after peaking in 1920, while population in the Great Falls Region reached a plateau around 1960 with little growth since.

Montana's population grew by 17 percent from 1969 to 1986 (Figure 2.10). Most of this growth, however, occurred in the 1970s; population grew by only 3 percent between 1979 and 1987. Regions growing faster than the state average for this later period were Helena, Kalispell, Bozeman, Missoula, Billings, and Miles City. Population in the remaining regions declined, with the largest decline occurring in the Butte Region.

A comparison of Figure 2.9 and Figure 2.10 provides insight into the relationship between population and total wage/salary jobs. Population

decline in 1986 and 1987 was due partly to the stagnation or decline of wage/salary jobs between 1979 and 1986 and slow growth of total jobs. It is possible that the decline in population in 1986 and 1987 was a delayed response to job stagnation and decline in previous years, or perhaps population growth for the 1980-1985 period was overestimated and the 1986 and 1987 estimates compensated for that phenomenon.

## INCOME

### Total Personal Income

In 1987, personal income totalled about \$10 billion. This comprehensive measure includes income from wages and salaries, employee benefits, income from self-employment, property income (interest, dividends, and rent), and transfer payments (such as social security, medical payments, and unemployment insurance). Table 2.9 reports total personal income at the state, regional, and county levels for 1959, 1969, and 1979-1987. All income and earnings data are presented in constant 1987 dollars.

Total personal income increased by 55 percent between 1969 and 1987, for an average annual growth rate of about 3.1 percent, slightly less than the national increase of 67 percent and the corresponding annual growth rate of 3.7 percent. Between 1979 and 1987, however, total Montana personal income grew more slowly, increasing by only 2 percent, or less than 0.3 percent per year compared to a national growth of 20 percent, or an average of 2.5 percent per year.

Table 2.10 illustrates total personal income growth in Montana's regions and counties. Income growth was moderate in the 1960s, strong in the 1970s, and weak between 1979 and 1986. Regions with growth greater than the state average between 1979 and 1986 included Bozeman, Glasgow-Wolf Point, Helena, Billings, Havre, and Kalispell, while the remaining regions grew more slowly. In several regions, total income actually decreased (Great Falls, Miles City, Lewistown, and Butte). It should be noted, however, that because only two years are presented in the table, some of the reported growth rates may be misleading. This condition is especially evident in regions where agriculture, a volatile sector, is a dominant industry, and exists to some extent at the state level, as shown in Figure 2.11. The instability of total personal income between 1979 and 1987 is partly because of instability in farm earnings, particularly in 1986.

### Components of Personal Income

Figure 2.12 presents the numerous total personal income components and show how they have changed over time. The percentages include a 1969-1971 average and a 1984-1987 average so that volatility in agriculture is not a problem.

**Nonfarm earnings**, the largest component of personal income, accounted for 61 percent of income during the 1984-1987 period, down from 65 percent in 1969-1971. A comparison of Figure 2.11 and Figure 2.10 shows that nonfarm

earnings closely followed the path of wage/salary jobs between 1979 and 1986. The national recession in 1980–1982 produced a steady decline in nonfarm earnings until the recovery in 1983 and 1984. This recovery offset the decline in farm earnings, and total personal income increased as well. Nonfarm earnings declined in 1985 as a new recession occurred in Montana, and this decline continued in 1986 and 1987. Table 2.11 details nonfarm earnings for Montana's regions and counties. Not surprisingly, regions with high total personal income also had high nonfarm earnings.

**Property Income and Transfer Payments.** In recent years, the shares of property income (composed of interest payments, dividends on stocks, and rent) and transfer payments in total income have increased substantially. For the 1984–1987 period, property income accounted for 19 percent and transfer payments accounted for 17 percent of total personal income. These shares were up from 13 percent and 11 percent, respectively, in the 1969–1971 period.

As shown in Table 2.12 and Figure 2.11, property income increased substantially between 1979 and 1984, partly reflecting the high interest rates that accompanied the tight monetary policy of the U.S. Federal Reserve Board in the early 1980s. This growth contributed to total personal income growth, particularly in 1981. After 1984, property income leveled off and even declined slightly in 1987 (after adjusting for inflation).

Transfer payments experienced steady upward growth between 1979 and 1987, (Table 2.13 and Figure 2.11), contributing to an increase in total personal income over the entire period. Because transfer payments are generally a function of population, however, it is helpful to consider the performance of transfer payments relative to population. Between 1979 and 1987, transfer payments increased by 35 percent while population grew by only 3 percent. Thus, per capita transfer payments increased over this period.

Farm earnings accounted for an average of 2.3 percent of total personal income during the 1984–1987 period, down substantially from 10.7 percent during 1969–1971. This decline—seen both in the Montana economy and at the national level—represents a major trend away from agriculture and toward the service sectors. The distribution of farm earnings throughout the state differs significantly from that of other components of personal income, as shown in Table 2.14. In 1986, the top farm earnings regions were Great Falls, Billings, Glendive–Sidney, Havre, Glasgow–Wolf Point, and Miles City.

The performance of farm earnings between 1979 and 1987 was volatile (Figure 2.110). Earnings increased slightly between 1979 and 1981, and peaked in 1981. Between 1981 and 1985, farm earnings plummeted almost to zero, becoming negative in several of Montana's regions. Numerous factors were responsible for this period of hardship that existed for farmers in Montana and throughout the country. Early in the period, high interest rates hindered borrowing and made repayment of old debts difficult, overproduction reduced the price of agricultural goods, and inflation diminished domestic purchasing power while a strong dollar raised the price of U.S. products in foreign countries. Nationwide, farm earnings began to recover in 1984, but especially severe drought conditions in 1985 delayed Montana's recovery. Recovery began in

1986 and farm earnings increased dramatically, translating into an increase in total personal income during the year despite declines in nonfarm earnings. In 1987, farm earnings were estimated between \$400 and \$500 million, which is about the same (after adjusting for inflation) as existed in 1981, the previous peak in farm earnings.

**Per Capita Income and Earnings Per Job.** With a per capita income of \$12,350 in 1987, Montana ranked 40th in the nation. This figure was substantially less than the national average of \$15,500. But, as Table 2.15 indicates, the 1987 per capita income figure was generally higher in recent years, partly reflecting the farm earnings recovery in 1986 and 1987 and its influence on per capita income. When comparing average per capita income from 1982 to 1986, the regions ranked the following way (from highest per capita income to lowest): Billings, Helena, and Great Falls, all with per capita incomes greater than the Montana average; and Miles City, Butte, Glendive-Sidney, Bozeman, Missoula, Havre, Lewistown, Kalispell, and Glasgow-Wolf Point, all with per capita incomes less than the Montana average. Because of agriculture fluctuations in several of these regions, however, some of these ranks may be misleading. Table 2.16 provides more detail, presenting per capita income as a percent of the Montana average.

Studying earnings-per-job provides a particularly useful comparison between the farm sector and the nonfarm sector (Table 2.17 and Figure 2.13). Farm earnings per job were very high in 1969, even though 1969 was an average year for agriculture. By 1979, however, farm earnings per job were far less than nonfarm earnings per job. After reaching a low of less than \$100 per farm job in 1985, this figure increased dramatically in 1986 to \$11,700 per farm job. Preliminary data for 1987 indicate a continued increase in Montana's average farm earnings to about \$14,000.

Between 1979 and 1986, nonfarm earnings per job in Montana declined steadily from \$19,100 to \$16,800 for a loss of 12 percent after adjusting for inflation. Preliminary data for 1987 indicate a continued decline to about \$16,300. In contrast, nonfarm earnings per job for the nation were substantially higher at \$21,600 in 1979 and \$21,500 in 1986. The magnitude of the difference between Montana's figure and that for the nation may, in part, reflect cost-of-living differences. The sharp decline in nonfarm earnings per job, however, reflects a significant change in the Montana economy that did not occur nationally.

Figure 2.1

## MONTANA REGIONS

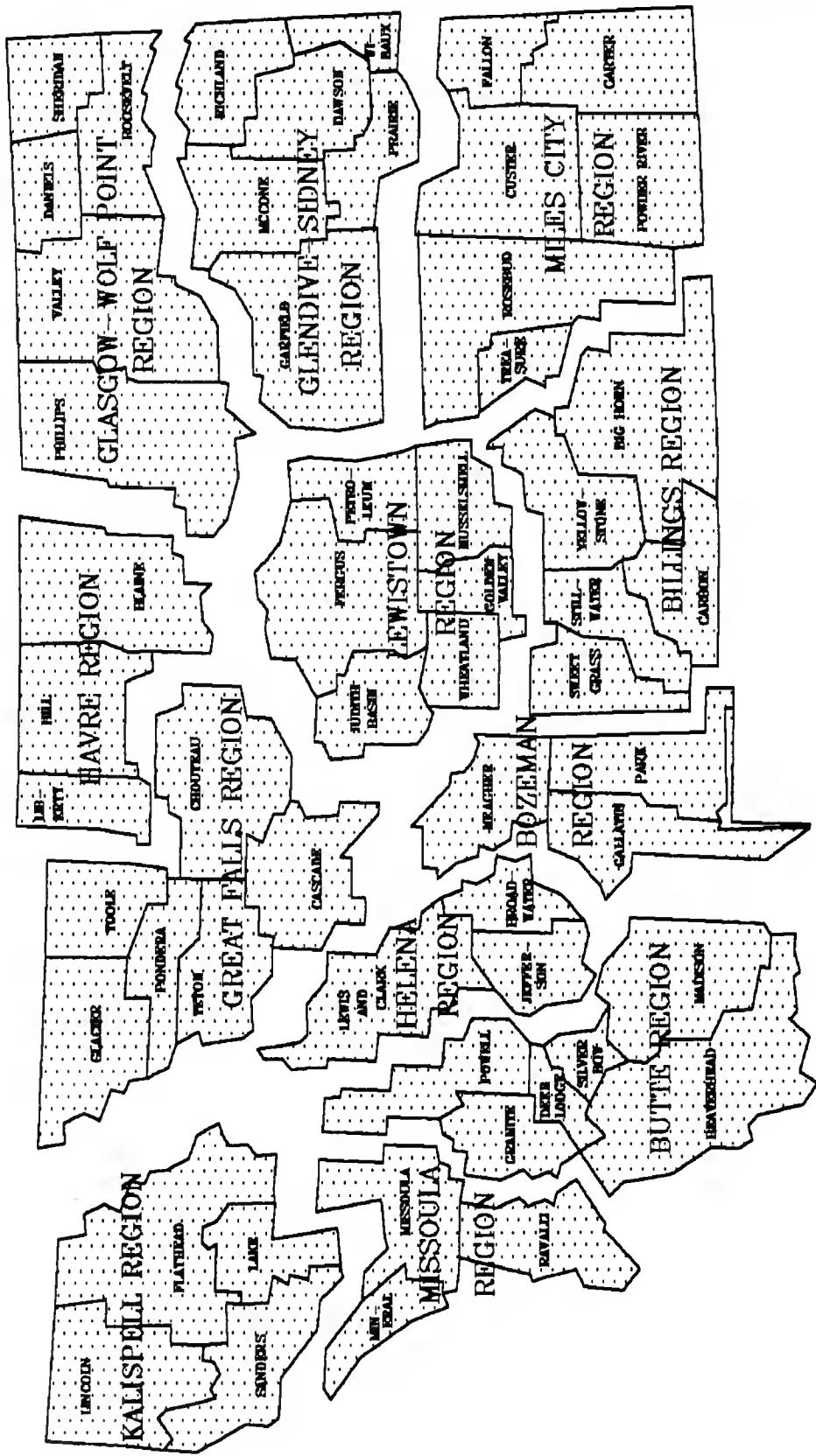


Table 2.1

TOTAL JOBS IN MONTANA BY REGION AND COUNTY: 1969 - 1986\*

|                           | 1969    | 1970    | 1971    | 1972    | 1973    | 1974    | 1975    | 1976    | 1977    | 1978    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    |
|---------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Montana                   | 290,273 | 294,614 | 301,469 | 314,116 | 327,167 | 336,653 | 339,149 | 353,351 | 365,201 | 386,731 | 394,002 | 389,460 | 391,518 | 387,784 | 394,337 | 405,555 | 405,571 | 407,395 |
| Billions Region           | 47,060  | 49,632  | 50,347  | 52,750  | 55,847  | 58,694  | 59,735  | 63,478  | 66,619  | 71,188  | 72,706  | 73,651  | 74,348  | 75,849  | 78,958  | 78,732  | 78,788  |         |
| Big Horn                  | 3,927   | 3,927   | 3,801   | 3,869   | 4,142   | 4,200   | 4,271   | 4,575   | 5,067   | 5,147   | 5,193   | 5,066   | 4,812   | 4,764   | 4,889   | 4,957   | 4,935   |         |
| Carbon                    | 2,720   | 2,695   | 2,740   | 2,801   | 2,911   | 2,919   | 2,909   | 2,977   | 3,071   | 3,104   | 3,098   | 3,071   | 3,171   | 3,167   | 3,367   | 3,474   | 3,483   |         |
| Clark Fork                | 1,822   | 1,822   | 1,844   | 1,943   | 1,947   | 2,007   | 2,026   | 2,057   | 2,150   | 2,226   | 2,227   | 2,244   | 2,288   | 2,325   | 2,385   | 2,477   | 2,479   |         |
| St. Mary's                | 1,776   | 1,822   | 1,844   | 1,844   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   | 1,947   |         |
| Sweet Grass               | 1,337   | 1,337   | 1,345   | 1,345   | 1,443   | 1,443   | 1,443   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   | 1,520   |         |
| Yellowstone               | 3,666   | 3,666   | 3,746   | 40,370  | 45,681  | 48,098  | 49,132  | 52,762  | 55,509  | 59,553  | 61,170  | 60,286  | 61,650  | 62,562  | 63,859  | 66,314  | 66,459  |         |
| Bozeman Region            | 17,894  | 18,650  | 19,531  | 20,752  | 22,226  | 23,533  | 23,405  | 24,944  | 26,505  | 28,446  | 29,023  | 28,699  | 29,420  | 30,203  | 31,194  | 32,577  | 33,231  | 33,542  |
| Gallatin                  | 12,508  | 13,156  | 13,816  | 14,912  | 16,558  | 17,133  | 17,050  | 18,235  | 19,621  | 21,495  | 21,495  | 21,495  | 22,316  | 22,316  | 22,316  | 22,316  | 22,316  | 26,580  |
| Meagher Park              | 916     | 914     | 921     | 928     | 926     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     | 928     |
| Butte Region              | 4,440   | 4,580   | 4,774   | 4,912   | 5,276   | 5,392   | 5,426   | 5,886   | 5,966   | 6,223   | 6,498   | 6,498   | 6,143   | 6,143   | 6,240   | 6,310   | 6,341   |         |
| Blairhead                 | 3,223   | 3,192   | 3,116   | 3,409   | 3,887   | 3,653   | 3,653   | 3,609   | 3,609   | 3,670   | 3,670   | 3,670   | 3,884   | 3,884   | 3,884   | 3,884   | 3,884   |         |
| Near Lodge                | 5,819   | 6,231   | 5,793   | 5,912   | 5,912   | 5,001   | 6,066   | 5,819   | 5,819   | 5,166   | 4,694   | 4,694   | 3,741   | 3,657   | 3,657   | 3,646   | 3,631   |         |
| Glacier                   | 1,103   | 1,111   | 1,091   | 1,190   | 1,190   | 1,190   | 1,190   | 1,151   | 1,131   | 1,093   | 1,159   | 1,159   | 1,123   | 1,144   | 1,168   | 1,195   | 1,228   |         |
| Madison                   | 2,220   | 2,240   | 2,282   | 2,327   | 2,494   | 2,494   | 2,494   | 2,442   | 2,442   | 2,401   | 2,462   | 2,462   | 2,656   | 2,775   | 2,885   | 2,885   | 2,885   |         |
| Powell                    | 15,559  | 15,559  | 16,539  | 16,539  | 17,319  | 17,753  | 17,753  | 16,776  | 16,776  | 17,243  | 17,425  | 17,425  | 17,533  | 17,533  | 17,533  | 17,533  | 17,533  |         |
| Silver Bow                | 15,288  | 16,148  | 16,213  | 16,264  | 16,566  | 17,043  | 17,043  | 17,466  | 17,232  | 17,051  | 16,955  | 16,955  | 17,007  | 16,886  | 17,113  | 17,113  | 17,113  |         |
| Glacier-Golf Point Region | 16,130  | 16,099  | 16,213  | 16,264  | 16,566  | 17,043  | 17,043  | 17,466  | 17,232  | 17,051  | 16,955  | 16,955  | 17,007  | 16,886  | 17,113  | 17,113  | 17,113  |         |
| Daniels                   | 6,620   | 6,620   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   | 6,584   |         |
| Philips                   | 4,621   | 4,621   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   | 4,622   |         |
| Rossevelt                 | 2,631   | 2,631   | 2,614   | 2,614   | 2,557   | 2,595   | 2,595   | 2,736   | 2,807   | 2,687   | 2,674   | 2,674   | 2,660   | 2,653   | 2,653   | 2,653   | 2,653   |         |
| Shardian Valley           | 5,110   | 5,279   | 5,410   | 5,798   | 5,814   | 6,102   | 5,867   | 5,857   | 5,857   | 5,303   | 5,258   | 5,258   | 5,043   | 4,695   | 4,695   | 4,695   | 4,695   |         |
| Glendive-Sidney Region    | 13,612  | 13,509  | 13,509  | 13,603  | 14,907  | 14,907  | 14,907  | 14,601  | 14,601  | 15,059  | 15,188  | 15,188  | 16,017  | 16,707  | 16,707  | 16,707  | 16,707  |         |
| Owens                     | 5,465   | 5,216   | 5,198   | 5,396   | 5,396   | 5,691   | 5,691   | 5,691   | 5,691   | 5,691   | 5,691   | 5,691   | 5,691   | 6,026   | 6,026   | 6,026   | 6,026   |         |
| Garfield                  | 970     | 970     | 955     | 955     | 954     | 974     | 974     | 974     | 974     | 974     | 974     | 974     | 974     | 974     | 974     | 974     | 974     |         |
| McCone                    | 1,499   | 1,499   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   | 1,606   |         |
| Prarie                    | 4,618   | 4,618   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   | 4,689   |         |
| Richard                   | 4,382   | 4,382   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   | 4,489   |         |
| Wibaux                    | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     | 681     |         |
| Great Falls Region        | 36,476  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  | 36,994  |         |
| Cascade                   | 3,259   | 3,259   | 3,043   | 3,043   | 3,034   | 3,034   | 3,034   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   | 3,021   |         |
| Chouteau                  | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   | 3,043   |         |
| Glacier                   | 4,079   | 4,135   | 4,332   | 4,332   | 2,817   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   | 2,894   |         |
| Pandora                   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   | 2,611   |         |
| Teton                     | 2,692   | 2,590   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   | 2,676   |         |
| Toole                     | 2,792   | 2,914   | 2,913   | 2,789   | 2,692   | 3,113   | 3,134   | 3,134   | 3,134   | 3,134   | 3,236   | 3,236   | 3,236   | 3,341   | 3,341   | 3,341   | 3,341   |         |
| Harve Region              | 11,302  | 11,491  | 11,645  | 12,030  | 12,316  | 12,694  | 12,891  | 13,130  | 13,575  | 14,380  | 14,380  | 14,380  | 13,713  | 13,713  | 13,713  | 13,713  | 13,713  |         |
| Blaine                    | 2,666   | 2,720   | 2,759   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   | 2,807   |         |
| Hill                      | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   | 1,482   |         |
| Liberty                   | 1,112   | 1,112   | 1,161   | 1,170   | 1,145   | 1,213   | 1,195   | 1,177   | 1,158   | 1,131   | 1,121   | 1,121   | 1,121   | 1,121   | 1,121   | 1,121   | 1,121   |         |
| Helena Region             | 10,380  | 19,919  | 20,705  | 21,511  | 22,745  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  | 23,555  |         |
| Broadwater                | 1,038   | 1,038   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   | 1,052   |         |
| Jefferson                 | 1,852   | 1,852   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   | 1,844   |         |
| Lewis & Clark             | 16,490  | 17,023  | 17,023  | 17,681  | 18,405  | 19,077  | 19,588  | 20,329  | 21,950  | 23,287  | 24,391  | 24,391  | 24,391  | 25,985  | 25,985  | 25,985  | 25,985  |         |
| Kalispell Region          | 29,641  | 25,192  | 31,001  | 32,593  | 34,293  | 34,459  | 36,514  | 38,743  | 41,954  | 43,029  | 43,029  | 43,029  | 43,029  | 43,029  | 43,029  | 43,029  | 43,029  |         |
| Flathead                  | 14,976  | 15,124  | 16,005  | 17,045  | 18,871  | 19,133  | 19,133  | 19,133  | 19,133  | 19,133  | 22,095  | 22,095  | 22,095  | 24,852  | 24,852  | 24,852  | 24,852  |         |
| Lake                      | 4,639   | 4,536   | 4,917   | 4,917   | 4,520   | 4,663   | 5,663   | 5,663   | 5,663   | 5,663   | 6,045   | 6,045   | 6,045   | 6,422   | 6,422   | 6,422   | 6,422   |         |
| Judith Basin              | 1,252   | 1,252   | 1,042   | 1,265   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   | 1,271   |         |
| Mississihi                | 1,522   | 1,564   | 1,637   | 1,698   | 1,743   | 1,808   | 1,808   | 1,808   | 1,808   | 1,808   | 1,904   | 1,904   | 1,904   | 1,904   | 1,904   | 1,904   | 1,904   |         |
| Petroleum                 | 2,583   | 2,583   | 2,583   | 2,912   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   | 3,339   |         |
| Wheatland                 | 519     | 513     | 489     | 487     | 487     | 514     | 504     | 498     | 498     | 498     | 476     | 476     | 476     | 476     | 476     | 476     | 476     |         |
| Miles City Region         | 12,796  | 12,664  | 12,975  | 13,199  | 13,693  | 14,763  | 15,619  | 15,345  | 15,651  | 15,651  | 16,340  | 16,340  | 16,340  | 16,340  | 16,340  | 16,340  | 16,340  |         |
| Carter                    | 1,034   | 1,005   | 998     | 996     | 942     | 880     | 880     | 880     | 880     | 880     | 880     | 880     | 880     | 880     | 880     | 880     | 880     |         |
| Custer                    | 5,491   | 5,377   | 5,469   | 5,555   | 5,678   | 6,124   | 6,311   | 6,311   | 6,311   | 6,311   | 6,706   | 6,706   | 6,706   | 6,880   | 6,880   | 6,880   | 6,880   |         |
| Fallon                    | 1,774   | 1,900   | 1,773   | 1,761   | 1,761   | 1,761   | 1,761   | 1,761   | 1,761   | 1,761   | 2,057   | 2,057   | 2,057   | 2,057   | 2,057   | 2,057   | 2,057   |         |
| Poudre River              | 2,422   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   | 2,411   |         |
| Gobaboo                   | 4,781   | 4,771   | 5,066   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   | 5,503   |         |
| Treasure                  | 30,307  | 30,556  | 32,238  | 34,351  | 36,261  | 37,811  | 37,811  | 37,811  | 37,811  | 37,811  | 40,784  | 40,784  | 40,784  | 44,022  | 44,022  | 44,022  | 44,022  |         |
| Missoula Region           | 1,245   | 1,176   | 1,222   | 1,175   | 1,427   | 1       |         |         |         |         |         |         |         |         |         |         |         |         |

Figure 2.2

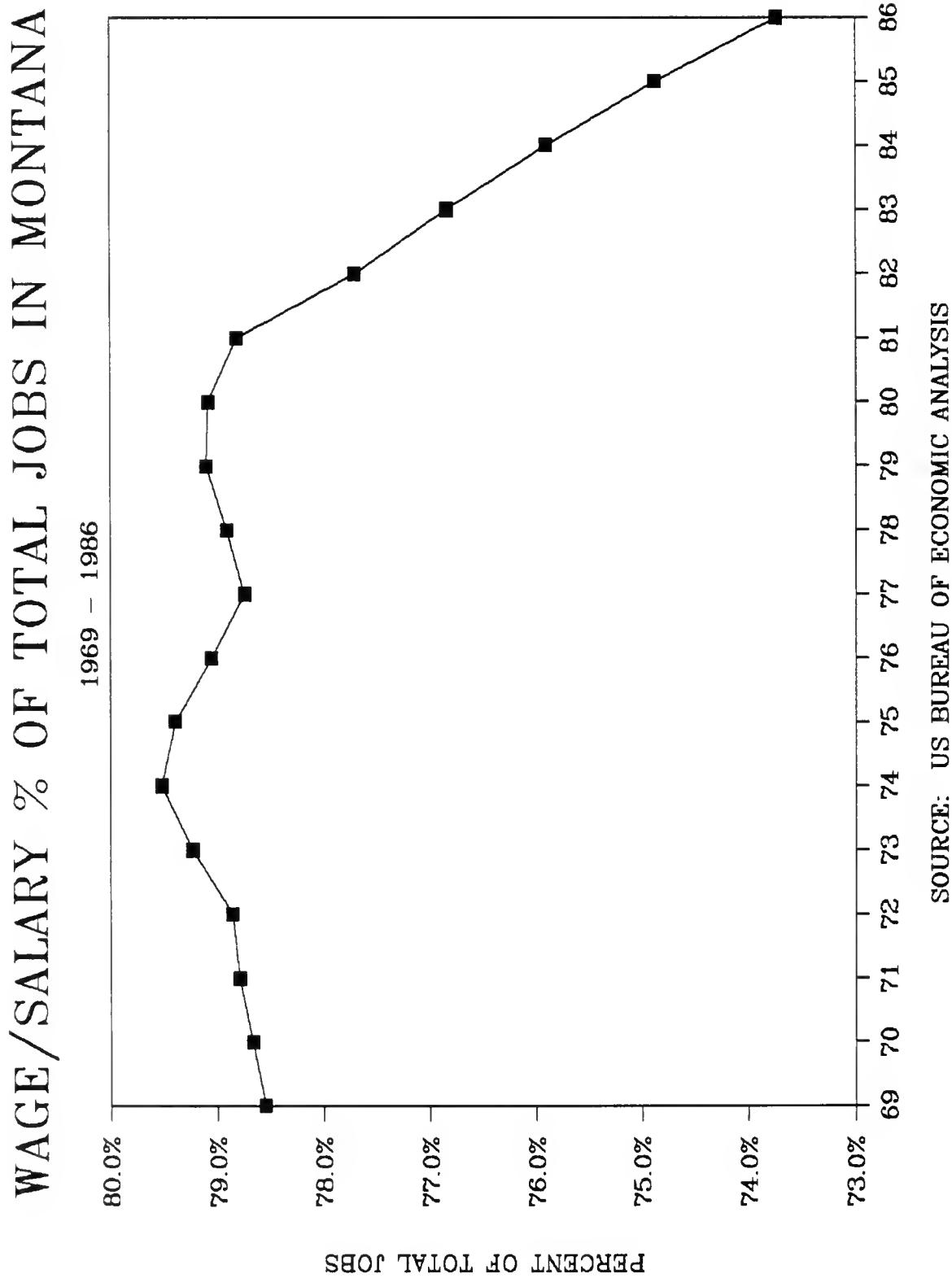


Table 2.2

\* Note: Includes both full- and part-time jobs. State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Table 2.3

## WAGE &amp; SALARY EMPLOYMENT IN MONTANA REGIONS AND COUNTIES\*: 1986-1987

| REGION                           | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|----------------------------------|---------|---------|--------|-------------------|
| Montana                          | 263,662 | 264,285 | 623    | 0.2%              |
| Billings Region                  | 51,437  | 51,054  | (383)  | -0.7%             |
| Big Horn                         | 2,941   | 2,870   | (71)   | -2.4%             |
| Carbon                           | 1,571   | 1,473   | (98)   | -6.2%             |
| Stillwater                       | 1,180   | 1,374   | 194    | 16.4%             |
| Sweet Grass                      | 652     | 678     | 26     | 4.0%              |
| Yellowstone                      | 45,093  | 44,659  | (434)  | -1.0%             |
| Bozeman Region                   | 20,477  | 20,227  | (250)  | -1.2%             |
| Gallatin                         | 16,777  | 16,662  | (115)  | -0.7%             |
| Meagher                          | 481     | 465     | (16)   | -3.3%             |
| Park                             | 3,219   | 3,100   | (119)  | -3.7%             |
| Butte Region                     | 19,818  | 20,185  | 367    | 1.9%              |
| Beaverhead                       | 2,456   | 2,474   | 18     | 0.7%              |
| Deer Lodge                       | 2,614   | 2,538   | (76)   | -2.9%             |
| Granite                          | 590     | 652     | 62     | 10.5%             |
| Madison                          | 1,295   | 1,331   | 36     | 2.8%              |
| Powell                           | 1,973   | 1,918   | (55)   | -2.8%             |
| Silver Bow                       | 10,890  | 11,272  | 382    | 3.5%              |
| Glasgow-Wolf Point Region        | 8,957   | 8,832   | (125)  | -1.4%             |
| Daniels                          | 595     | 612     | 17     | 2.9%              |
| Phillips                         | 1,384   | 1,382   | (2)    | -0.1%             |
| Roosevelt                        | 3,311   | 3,235   | (76)   | -2.3%             |
| Sheridan                         | 1,320   | 1,316   | (4)    | -0.3%             |
| Valley                           | 2,347   | 2,287   | (60)   | -2.6%             |
| Glendive-Sidney Region           | 8,385   | 7,783   | (602)  | -7.2%             |
| Dawson                           | 3,335   | 3,084   | (251)  | -7.5%             |
| Garfield                         | 294     | 270     | (24)   | -8.2%             |
| McCone                           | 524     | 519     | (5)    | -1.0%             |
| Prairie                          | 322     | 309     | (13)   | -4.0%             |
| Richland                         | 3,673   | 3,379   | (294)  | -8.0%             |
| Wibaux                           | 237     | 222     | (15)   | -6.3%             |
| Great Falls Region               | 34,909  | 34,993  | 84     | 0.2%              |
| Cascade                          | 25,974  | 26,050  | 76     | 0.3%              |
| Chouteau                         | 1,014   | 995     | (19)   | -1.9%             |
| Glacier                          | 3,567   | 3,579   | 12     | 0.3%              |
| Pondera                          | 1,530   | 1,517   | (13)   | -0.8%             |
| Teton                            | 1,252   | 1,285   | 33     | 2.6%              |
| Toole                            | 1,572   | 1,567   | (5)    | -0.3%             |
| Hayre Region                     | 6,945   | 6,897   | (48)   | -0.7%             |
| Blaine                           | 1,476   | 1,497   | 21     | 1.4%              |
| Hill                             | 5,013   | 4,930   | (83)   | -1.7%             |
| Liberty                          | 456     | 470     | 14     | 3.1%              |
| Helena Region                    | 22,803  | 23,394  | 591    | 2.6%              |
| Broadwater                       | 730     | 719     | (11)   | -1.5%             |
| Jefferson                        | 1,768   | 1,910   | 142    | 8.0%              |
| Lewis & Clark                    | 20,305  | 20,765  | 460    | 2.3%              |
| Kalispell Region                 | 29,979  | 30,759  | 780    | 2.6%              |
| Flathead                         | 18,400  | 18,786  | 376    | 2.1%              |
| Lake                             | 4,504   | 4,759   | 255    | 5.7%              |
| Lincoln                          | 5,116   | 5,173   | 57     | 1.1%              |
| Sanders                          | 1,951   | 2,041   | 90     | 4.6%              |
| Lewistown Region                 | 5,094   | 5,001   | (93)   | -1.8%             |
| Fergus                           | 3,155   | 3,142   | (13)   | -0.4%             |
| Golden Valley                    | 151     | 117     | (34)   | -22.5%            |
| Judith Basin                     | 358     | 351     | (7)    | -2.0%             |
| Musselshell                      | 878     | 854     | (24)   | -2.7%             |
| Petroleum                        | 74      | 65      | (9)    | -12.2%            |
| Wheatland                        | 478     | 472     | (6)    | -1.3%             |
| Miles City Region                | 10,065  | 9,678   | (387)  | -3.8%             |
| Carter                           | 263     | 255     | (8)    | -3.0%             |
| Custer                           | 4,290   | 4,263   | (27)   | -0.6%             |
| Fallon                           | 1,000   | 899     | (101)  | -10.1%            |
| Powder River                     | 469     | 443     | (26)   | -5.5%             |
| Rosebud                          | 3,857   | 3,658   | (199)  | -5.2%             |
| Treasure                         | 186     | 160     | (26)   | -14.0%            |
| Missoula Region                  | 34,721  | 35,405  | 684    | 2.0%              |
| Mineral                          | 991     | 984     | (7)    | -0.7%             |
| Missoula                         | 29,174  | 29,674  | 500    | 1.7%              |
| Ravalli                          | 4,556   | 4,747   | 191    | 4.2%              |
| Unidentified by Region or County | 10,048  | 10,054  | 6      | 0.1%              |

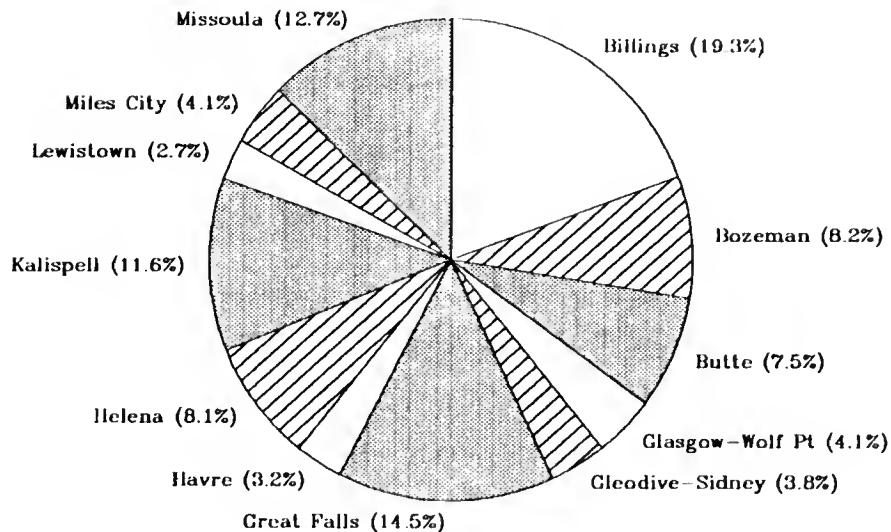
\*Includes only employment covered by the Unemployment Insurance Program.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.3

REGIONAL SHARES OF MONTANA JOBS 1986

SOURCE: US BUREAU OF ECONOMIC ANALYSIS



REGIONAL SHARES OF MONTANA JOBS 1969

SOURCE: US BUREAU OF ECONOMIC ANALYSIS

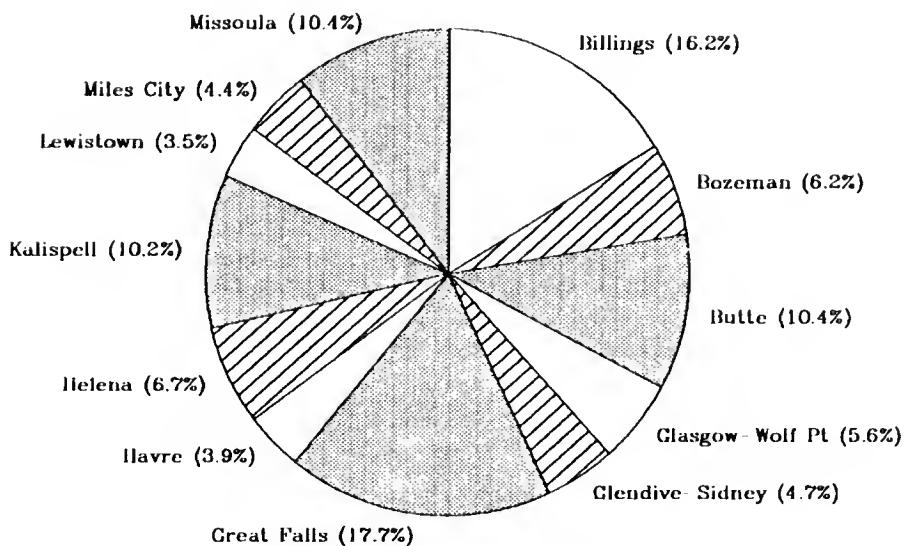


Figure 2.4

## % CHANGE IN TOTAL JOBS 1979 - 1986

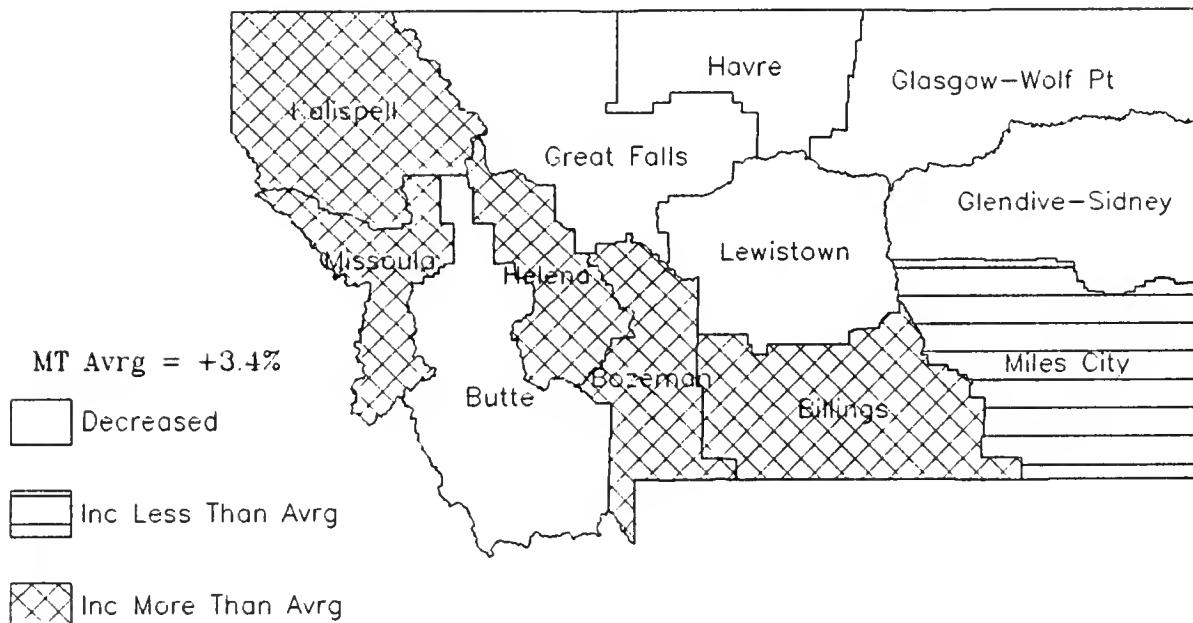


Table 2.4

### PERCENT CHANGE IN TOTAL NUMBER OF JOBS BY REGION: 1969 - 1986

| Region                    | 1969-1986             |                    | 1969-1979             |                    | 1979-1986             |                    |
|---------------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|
|                           | 1969-1986<br>% Change | Annual<br>% Change | 1969-1979<br>% Change | Annual<br>% Change | 1979-1986<br>% Change | Annual<br>% Change |
| Montana                   | 40.3%                 | 2.4%               | 35.7%                 | 3.6%               | 3.4%                  | 0.5%               |
| Billings Region           | 67.4%                 | 4.0%               | 55.5%                 | 5.6%               | 7.7%                  | 1.1%               |
| Bozeman Region            | 87.4%                 | 5.1%               | 62.2%                 | 6.2%               | 15.6%                 | 2.2%               |
| Butte Region              | 1.2%                  | 0.1%               | 8.6%                  | 0.9%               | -6.8%                 | -1.0%              |
| Glasgow-Wolf Point Region | 3.5%                  | 0.2%               | 6.6%                  | 0.7%               | -2.9%                 | -0.4%              |
| Glendive-Sidney Region    | 12.8%                 | 0.8%               | 21.4%                 | 2.1%               | -7.1%                 | -1.0%              |
| Great Falls Region        | 14.8%                 | 0.9%               | 20.6%                 | 2.1%               | -4.8%                 | -0.7%              |
| Havre Region              | 15.7%                 | 0.9%               | 27.2%                 | 2.7%               | -9.1%                 | -1.3%              |
| Helena Region             | 70.8%                 | 4.2%               | 48.9%                 | 4.9%               | 14.7%                 | 2.1%               |
| Kalispell Region          | 59.8%                 | 3.5%               | 45.2%                 | 4.5%               | 10.1%                 | 1.4%               |
| Lewistown Region          | 8.4%                  | 0.5%               | 10.2%                 | 1.0%               | -1.6%                 | -0.2%              |
| Miles City Region         | 31.7%                 | 1.9%               | 27.7%                 | 2.8%               | 3.2%                  | 0.5%               |
| Missoula Region           | 70.2%                 | 4.1%               | 61.9%                 | 6.2%               | 5.2%                  | 0.7%               |

Source: U.S. Bureau of Economic Analysis. Prepared by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Table 2.4 a

PERCENT CHANGE IN WAGE AND SALARY JOBS BY REGION: 1969 - 1986

| Region                    | 1969-1986             |                    | 1969-1979             |                    | 1979-1986             |                    | 1979-1986             |                    |
|---------------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|
|                           | 1969-1986<br>% Change | Annual<br>% Change | 1969-1979<br>% Change | Annual<br>% Change | 1979-1986<br>% Change | Annual<br>% Change | 1979-1986<br>% Change | Annual<br>% Change |
| Montana                   | 31.7%                 | 1.9%               | 36.7%                 | 3.7%               | -3.6%                 | -0.5%              |                       |                    |
| Billings Region           | 57.7%                 | 3.4%               | 57.6%                 | 5.8%               | 0.1%                  | 0.0%               |                       |                    |
| Bozeman Region            | 76.2%                 | 4.5%               | 61.5%                 | 6.1%               | 9.1%                  | 1.3%               |                       |                    |
| Butte Region              | -8.4%                 | -0.5%              | 5.5%                  | 0.5%               | -13.2%                | -1.9%              |                       |                    |
| Glasgow-Wolf Point Region | 7.1%                  | 0.4%               | 16.1%                 | 1.6%               | -7.7%                 | -1.1%              |                       |                    |
| Glendive-Sidney Region    | 14.7%                 | 0.9%               | 36.0%                 | 3.6%               | -15.6%                | -2.2%              |                       |                    |
| Great Falls Region        | 7.1%                  | 0.4%               | 20.7%                 | 2.1%               | -11.2%                | -1.6%              |                       |                    |
| Havre Region              | 14.2%                 | 0.8%               | 35.6%                 | 3.6%               | -15.8%                | -2.3%              |                       |                    |
| Helena Region             | 51.8%                 | 3.0%               | 43.0%                 | 4.3%               | 6.2%                  | 0.9%               |                       |                    |
| Kalispell Region          | 42.6%                 | 2.5%               | 40.2%                 | 4.0%               | 1.7%                  | 0.2%               |                       |                    |
| Lewistown Region          | 0.9%                  | 0.1%               | 13.7%                 | 1.4%               | -11.3%                | -1.6%              |                       |                    |
| Miles City Region         | 36.1%                 | 2.1%               | 38.2%                 | 3.8%               | -1.5%                 | -0.2%              |                       |                    |
| Missoula Region           | 53.6%                 | 3.2%               | 56.0%                 | 5.6%               | -1.5%                 | -0.2%              |                       |                    |

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office for Research and Information Services, Montana Department of Commerce, 1988.

Table 2.5

EMPLOYMENT GROWTH RATES FOR MONTANA REGIONS

|                           | WAGE & SALARY<br>JOBS<br>GROWTH RATES | 1979-1986 | SELF-EMPLOYED<br>GROWTH RATES | TOTAL JOBS<br>GROWTH RATES | 1979-1986 |
|---------------------------|---------------------------------------|-----------|-------------------------------|----------------------------|-----------|
|                           |                                       |           |                               |                            |           |
| Montana                   |                                       | -3.6%     | 29.9%                         |                            | 3.4%      |
| Billings Region           |                                       | 0.1%      | 40.8%                         |                            | 7.7%      |
| Bozeman Region            |                                       | 9.1%      | 39.9%                         |                            | 15.6%     |
| Butte Region              |                                       | -13.2%    | 23.3%                         |                            | -6.8%     |
| Glasgow-Wolf Point Region |                                       | -7.7%     | 7.5%                          |                            | -2.9%     |
| Glendive-Sidney Region    |                                       | -15.6%    | 17.4%                         |                            | -7.1%     |
| Great Falls Region        |                                       | -11.2%    | 23.3%                         |                            | -4.8%     |
| Havre Region              |                                       | -15.8%    | 12.1%                         |                            | -9.1%     |
| Helena Region             |                                       | 6.2%      | 54.8%                         |                            | 14.7%     |
| Kalispell Region          |                                       | 1.7%      | 38.0%                         |                            | 10.1%     |
| Lewistown Region          |                                       | -11.3%    | 15.6%                         |                            | -1.6%     |
| Miles City Region         |                                       | -1.5%     | 17.4%                         |                            | 3.2%      |
| Missoula Region           |                                       | -1.5%     | 35.4%                         |                            | 5.2%      |

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office for Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.5

## Self-Employment in Montana

1986

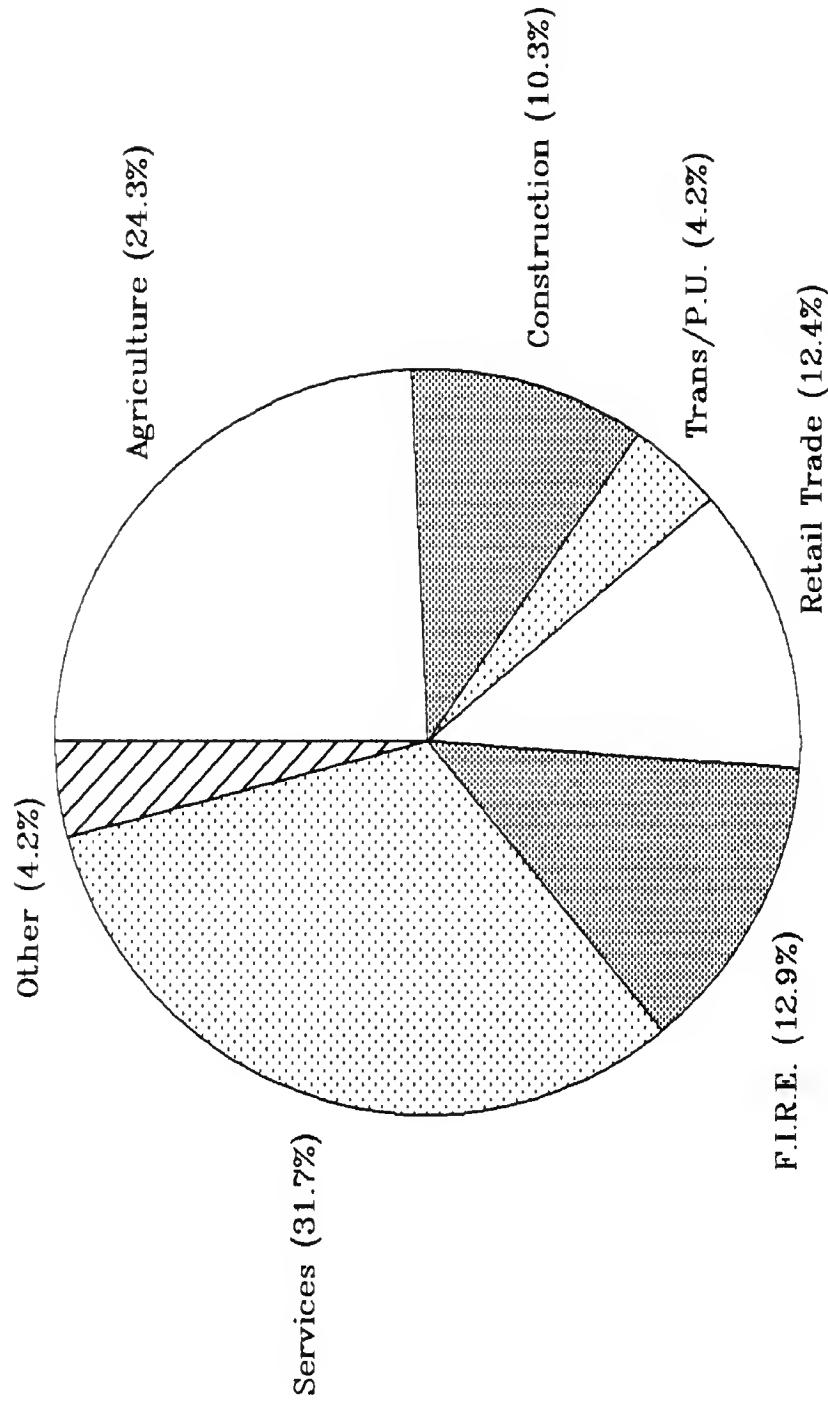
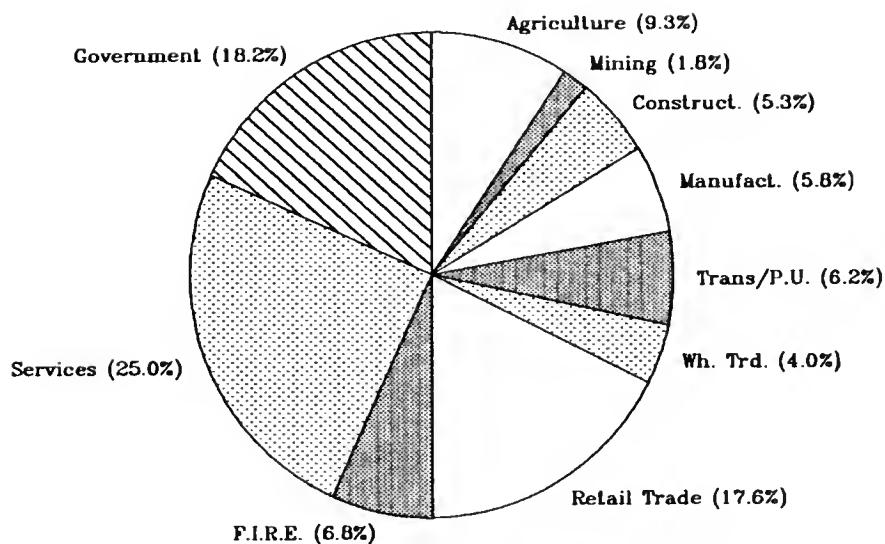


Figure 2.6

JOBs IN MONTANA

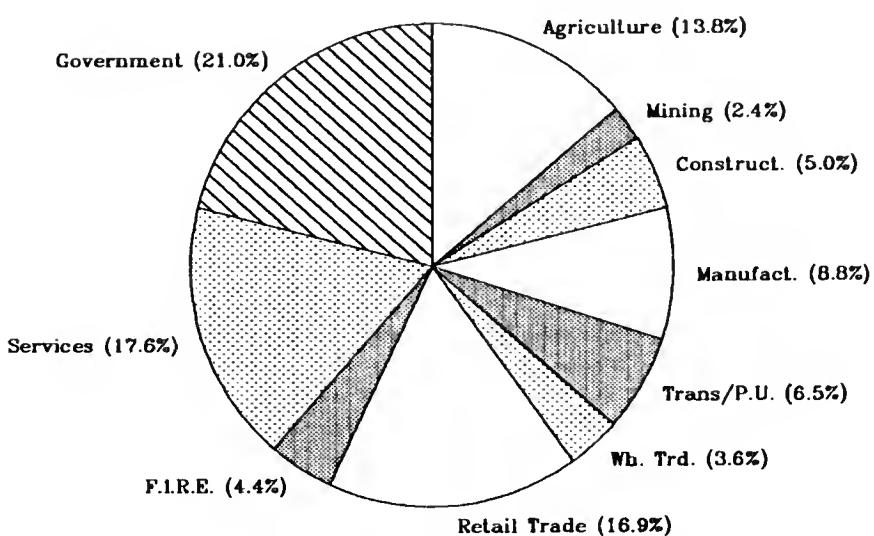
1986



SOURCE: US BUREAU OF ECONOMIC ANALYSIS

JOBs IN MONTANA

1969



SOURCE: US BUREAU OF ECONOMIC ANALYSIS

Table 2.6

WAGE &amp; SALARY EMPLOYMENT IN MONTANA\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986     | 1987    | CHANGE  | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|----------|---------|---------|-------------------|
| Total Wage and Salary Employment                    |               | 263,662  | 264,285 | 623     | 0.2%              |
| Total Private                                       |               | 201,933  | 202,846 | 913     | 0.5%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 2,910       | E 2,968  | E 58    | E 2.0%  |                   |
| Agricultural Production--Crops ***                  | 01            | 592      | 585     | (7)     | -1.2%             |
| Agricultural Production--Livestock ***              | 02            | 1,200    | 1,205   | 5       | 0.4%              |
| Agricultural Services                               | 07            | 896      | 973     | 77      | 8.6%              |
| Forestry                                            | 08            | 222      | 205     | (17)    | -7.7%             |
| Fishing, Hunting, and Trapping                      | 09            | "0"      | "0"     | "0"     | "0"               |
| Mining                                              |               | 5,800    | 5,767   | (33)    | -0.6%             |
| Metal Mining                                        | 10            | 1,202    | 1,709   | 507     | 42.2%             |
| Coal Mining                                         | 12            | 1,300    | 1,130   | (170)   | -13.1%            |
| Oil and Gas Extraction                              | 13            | 2,275    | 2,008   | (267)   | -11.7%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 1,022    | 919     | (103)   | -10.1%            |
| Construction                                        |               | 10,218   | 8,690   | (1,528) | -15.0%            |
| General Building Contractors                        | 15            | 2,806    | 2,391   | (415)   | -14.8%            |
| Heavy Construction Contractors                      | 16            | 2,939    | 2,304   | (635)   | -21.6%            |
| Special Trade Contractors                           | 17            | 4,472    | 3,994   | (478)   | -10.7%            |
| Manufacturing                                       | E 21,149      | E 20,911 | E (238) | E -1.1% |                   |
| Food and Kindred Products                           | 20            | 2,785    | 2,716   | (69)    | -2.5%             |
| Textile Mill Products                               | 22            | "0"      | "0"     | "0"     | "0"               |
| Apparel and Other Textile Products                  | 23            | 593      | 537     | (56)    | -9.4%             |
| Lumber and Wood Products                            | 24            | 8,235    | 8,358   | 123     | 1.5%              |
| Furniture and Fixtures                              | 25            | 227      | 216     | (11)    | -4.8%             |
| Paper and Allied Products                           | 26            | 857      | 845     | (12)    | -1.4%             |
| Printing and Publishing                             | 27            | 2,410    | 2,415   | (3)     | -0.1%             |
| Chemicals and Allied Products                       | 28            | 656      | 598     | (58)    | -8.8%             |
| Petroleum Refining and Related Industries           | 29            | 861      | 773     | (88)    | -10.2%            |
| Rubber and Miscellaneous Plastic Products           | 30            | 132      | 178     | 46      | 34.8%             |
| Leather and Leather Products                        | 31            | 71       | 48      | (23)    | -32.4%            |
| Stone, Clay, Glass, and Concrete Products           | 32            | 1,042    | 893     | (149)   | -14.3%            |
| Primary Metals Processing                           | 33            | 1,210    | 1,177   | (33)    | -2.7%             |
| Fabricated Metal Products                           | 34            | 571      | 542     | (29)    | -5.1%             |
| Machinery, Except Electrical                        | 35            | 481      | 538     | 57      | 11.9%             |
| Electrical and Electronic Equipment                 | 36            | 165      | 164     | (1)     | -0.6%             |
| Transportation Equipment                            | 37            | 197      | 188     | (9)     | -4.6%             |
| Instruments and Related Products                    | 38            | 131      | 148     | 17      | 13.0%             |
| Miscellaneous Manufacturing Industries              | 39            | 517      | 577     | 60      | 11.6%             |
| Transportation and Public Utilities                 |               | 16,746   | 16,143  | (603)   | -3.6%             |
| Local and Interurban Passenger Transit              | 41            | 1,132    | 1,040   | (92)    | -8.1%             |
| Trucking and Warehousing                            | 42            | 5,568    | 5,314   | (254)   | -4.5%             |
| Water Transportation                                | 44            | 18       | 16      | (2)     | -11.1%            |
| Transportation by Air                               | 45            | 853      | 995     | 142     | 16.6%             |
| Pipelines, Except Natural Gas                       | 46            | 97       | 77      | (20)    | -20.6%            |
| Transportation Services                             | 47            | 507      | 525     | 18      | 3.6%              |
| Communications                                      | 48            | 3,942    | 3,590   | (352)   | -8.9%             |
| Electric, Gas, and Sanitary Services                | 49            | 4,625    | 4,582   | (43)    | -0.9%             |
| Wholesale Trade                                     |               | 15,294   | 15,002  | (292)   | -1.9%             |
| Durable Goods                                       | 50            | 8,079    | 7,879   | (200)   | -2.5%             |
| Non-durable Goods                                   | 51            | 7,214    | 7,122   | (92)    | -1.3%             |
| Retail Trade                                        |               | 57,241   | 57,770  | 529     | 0.9%              |
| Building Materials and Hardware                     | 52            | 2,758    | 2,667   | (91)    | -3.3%             |
| General Merchandise Stores                          | 53            | 5,752    | 6,154   | 402     | 7.0%              |
| Food Stores                                         | 54            | 8,509    | 8,508   | (1)     | -0.0%             |
| Automotive Dealers and Service Stations             | 55            | 7,730    | 7,754   | 24      | 0.3%              |
| Apparel and Accessory Stores                        | 56            | 2,500    | 2,444   | (56)    | -2.2%             |
| Furniture and Home Furnishings Stores               | 57            | 2,156    | 2,163   | 7       | 0.3%              |
| Eating and Drinking Places                          | 58            | 21,803   | 21,944  | 141     | 0.6%              |
| Miscellaneous Retail                                | 59            | 6,030    | 6,134   | 104     | 1.7%              |
| Finance, Insurance, and Real Estate                 |               | 13,073   | 13,163  | 90      | 0.7%              |
| Banking                                             | 60            | 4,987    | 4,808   | (179)   | -3.6%             |
| Credit Agencies other than Banks                    | 61            | 1,834    | 1,861   | 27      | 1.5%              |
| Security, Commodity Brokers, and Services           | 62            | 577      | 604     | 27      | 4.7%              |
| Insurance Carriers                                  | 63            | 1,262    | 1,335   | 73      | 5.8%              |
| Insurance Agents, Brokers, and Services             | 64            | 1,754    | 1,726   | (28)    | -1.6%             |
| Real Estate                                         | 65            | 2,420    | 2,536   | 116     | 4.8%              |
| Combined Real Estate, Insurance, Etc.               | 66            | 96       | 96      | 0       | 0.0%              |
| Holding and Other Investment Offices                | 67            | 141      | 193     | 52      | 36.9%             |
| Services                                            |               | 59,406   | 62,363  | 2,957   | 5.0%              |
| Hotels and Other Lodging Places                     | 70            | 6,881    | 6,952   | 71      | 1.0%              |
| Personal Services                                   | 72            | 2,951    | 2,908   | (43)    | -1.5%             |
| Business Services                                   | 73            | 6,297    | 6,815   | 518     | 8.2%              |
| Auto Repair, Services, and Garages                  | 75            | 2,024    | 1,984   | (40)    | -2.0%             |
| Miscellaneous Repair Services                       | 76            | 855      | 956     | 101     | 11.8%             |
| Motion Pictures                                     | 78            | 600      | 558     | (42)    | -7.0%             |
| Amusement and Recreation Services                   | 79            | 2,348    | 2,547   | 199     | 8.5%              |
| Private Health Services                             | 80            | 21,883   | 20,457  | 1,574   | 7.2%              |
| Legal Services                                      | 81            | 1,950    | 2,088   | 138     | 7.1%              |
| Private Educational Services                        | 82            | 1,808    | 1,870   | 62      | 3.4%              |
| Private Social Services                             | 83            | 4,134    | 4,740   | 406     | 9.4%              |
| Museums, Art Galleries, Etc.                        | 84            | 93       | 104     | 11      | 11.8%             |
| Membership Organizations Including Tribal Gov't     | 86            | 4,204    | 4,109   | (95)    | -2.3%             |
| Private Households                                  | 88            | 327      | 355     | 28      | 8.6%              |
| Engineering, Accounting, and Other Services         | 89            | 2,843    | 2,914   | 71      | 2.5%              |
| Non-Classifiable                                    | 99            | 71       | 37      | (34)    | -47.9%            |
| Government                                          |               | 61,729   | 61,439  | (290)   | -0.5%             |
| State                                               |               | 15,589   | 15,306  | (283)   | -1.8%             |
| Local                                               |               | 33,469   | 33,008  | (461)   | -1.4%             |
| Federal                                             |               | 12,670   | 13,124  | 454     | 3.6%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

\*0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Table 2.7

|                           | 1970 | 1971 | 1972 | 1973 | 1974 | 1975  | 1976  | 1977  | 1978  | 1979  | 1980  | 1981  | 1982  | 1983  | 1984  | 1985  | 1986  | 1987  |      |
|---------------------------|------|------|------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|
| <b>Montana</b>            | 4.31 | 4.81 | 4.81 | 4.81 | 5.21 | 6.41  | 6.13  | 6.41  | 6.21  | 5.11  | 6.11  | 6.91  | 8.61  | 8.81  | 7.41  | 7.71  | 8.11  | 7.41  |      |
| Billings Region           | 4.21 | 4.51 | 4.61 | 4.31 | 5.41 | 4.81  | 5.01  | 5.01  | 3.71  | 4.81  | 5.51  | 6.71  | 7.91  | 7.21  | 7.51  | 8.21  | 7.61  | 7.61  |      |
| Big Horn                  | 4.61 | 6.01 | 6.61 | 6.71 | 7.11 | 5.91  | 5.61  | 5.01  | 6.41  | 5.01  | 6.41  | 9.11  | 8.51  | 10.21 | 14.61 | 13.61 | 13.61 | 13.61 |      |
| Carbon                    | 4.61 | 5.11 | 6.31 | 5.01 | 6.11 | 5.31  | 4.51  | 4.31  | 4.61  | 4.31  | 4.61  | 7.21  | 7.41  | 6.11  | 7.41  | 6.31  | 6.31  | 7.41  |      |
| Stimulwater               | 3.81 | 5.71 | 4.81 | 4.21 | 2.71 | 4.71  | 5.21  | 4.51  | 3.31  | 3.81  | 4.01  | 4.01  | 8.51  | 11.21 | 8.61  | 7.41  | 6.31  | 6.31  | 6.31 |
| Sweet Grass               | 3.81 | 4.01 | 2.71 | 2.51 | 2.51 | 2.81  | 2.51  | 2.51  | 2.51  | 2.11  | 2.11  | 3.41  | 4.51  | 6.01  | 6.41  | 7.51  | 6.81  | 7.21  |      |
| Yellowstone               | 4.21 | 4.41 | 4.41 | 4.11 | 4.21 | 5.31  | 4.71  | 4.81  | 4.91  | 4.71  | 4.81  | 5.31  | 6.41  | 7.81  | 7.01  | 7.31  | 7.71  | 7.21  |      |
| Bozeman Region            | 3.31 | 3.61 | 3.91 | 3.41 | 4.81 | 6.51  | 5.21  | 5.31  | 5.11  | 4.61  | 6.31  | 6.11  | 7.31  | 6.31  | 5.61  | 6.61  | 6.31  | 6.31  |      |
| Gallatin                  | 3.81 | 3.01 | 3.41 | 3.01 | 4.01 | 4.91  | 9.71  | 5.81  | 5.41  | 5.81  | 5.91  | 5.41  | 6.31  | 6.41  | 4.81  | 5.01  | 6.01  | 5.71  |      |
| Heather Park              | 4.61 | 5.71 | 6.41 | 5.51 | 6.01 | 7.61  | 6.61  | 6.61  | 6.61  | 7.11  | 8.31  | 10.81 | 10.61 | 10.81 | 7.51  | 7.81  | 9.01  | 8.61  |      |
| Butte Region              | 3.91 | 5.61 | 4.51 | 4.31 | 4.91 | 7.31  | 7.81  | 7.91  | 8.71  | 8.71  | 10.61 | 11.81 | 9.81  | 8.81  | 9.01  | 9.01  | 8.31  | 8.31  |      |
| Beaverhead                | 2.41 | 5.91 | 3.41 | 3.21 | 3.81 | 5.01  | 5.51  | 4.01  | 4.21  | 3.71  | 3.71  | 6.01  | 6.51  | 5.31  | 6.01  | 5.81  | 5.41  | 5.41  |      |
| Deer Lodge                | 6.21 | 7.11 | 6.51 | 6.11 | 4.11 | 6.51  | 6.61  | 6.61  | 7.01  | 7.01  | 7.01  | 15.11 | 11.91 | 10.81 | 11.01 | 11.01 | 11.01 | 11.01 |      |
| Granite                   | 5.01 | 1.51 | 4.71 | 4.81 | 5.21 | 6.91  | 6.01  | 6.01  | 6.01  | 6.91  | 7.71  | 6.91  | 11.81 | 9.51  | 13.11 | 5.51  | 5.51  | 5.51  |      |
| Madison                   | 4.91 | 4.71 | 5.11 | 4.91 | 4.71 | 6.51  | 7.81  | 6.01  | 6.71  | 6.61  | 6.31  | 6.31  | 10.11 | 9.71  | 8.01  | 7.41  | 7.41  | 7.41  |      |
| Powell                    | 4.81 | 4.71 | 5.61 | 4.41 | 5.21 | 8.11  | 9.31  | 9.11  | 8.61  | 6.21  | 8.31  | 11.31 | 13.51 | 11.81 | 9.71  | 10.21 | 9.21  | 9.21  |      |
| Silver Bow                | 3.91 | 6.21 | 4.61 | 4.41 | 4.41 | 4.01  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  |      |
| Glasgow-Wolf Point Region | 4.31 | 4.81 | 4.11 | 4.91 | 4.01 | 4.81  | 4.71  | 6.11  | 5.21  | 3.91  | 4.21  | 6.91  | 6.91  | 6.41  | 6.41  | 7.81  | 7.11  | 7.11  |      |
| Dawson                    | 4.21 | 4.41 | 4.21 | 4.21 | 4.91 | 3.51  | 4.61  | 4.31  | 2.01  | 3.01  | 4.11  | 4.81  | 4.81  | 4.21  | 4.21  | 4.71  | 4.61  | 4.61  |      |
| Phillips                  | 5.81 | 6.01 | 4.61 | 6.51 | 5.21 | 5.21  | 5.41  | 6.01  | 5.51  | 5.51  | 5.51  | 5.81  | 7.51  | 7.81  | 9.51  | 8.81  | 8.81  | 8.81  |      |
| Roosevelt                 | 3.31 | 3.91 | 3.61 | 3.91 | 3.01 | 3.11  | 2.41  | 2.41  | 2.21  | 2.51  | 1.61  | 1.61  | 4.01  | 4.61  | 3.81  | 5.71  | 4.81  | 4.81  |      |
| Sheridan Valley           | 4.01 | 5.01 | 3.91 | 4.71 | 4.31 | 5.91  | 6.61  | 8.81  | 7.11  | 5.11  | 6.41  | 6.41  | 8.71  | 9.71  | 7.11  | 8.01  | 7.11  | 7.11  |      |
| Glenview-Sidney Region    | 2.91 | 3.71 | 3.41 | 3.51 | 3.11 | 3.51  | 3.11  | 3.51  | 3.81  | 3.81  | 3.81  | 3.81  | 2.81  | 2.81  | 5.61  | 5.71  | 5.71  | 5.71  |      |
| Dawson                    | 2.91 | 3.71 | 3.41 | 3.31 | 1.91 | 1.21  | 1.31  | 2.71  | 2.61  | 2.61  | 3.31  | 4.71  | 3.11  | 2.31  | 2.31  | 3.61  | 3.41  | 3.41  |      |
| Garfield                  | 1.41 | 2.31 | 2.31 | 1.91 | 2.61 | 2.11  | 2.21  | 2.11  | 2.11  | 2.11  | 2.11  | 2.11  | 1.91  | 1.91  | 2.11  | 2.11  | 2.11  | 2.11  |      |
| McCone                    | 1.91 | 2.61 | 2.61 | 2.61 | 2.91 | 2.11  | 2.91  | 2.01  | 2.11  | 2.11  | 2.11  | 2.11  | 2.71  | 4.61  | 5.11  | 5.61  | 5.61  | 5.61  |      |
| Prairie                   | 3.01 | 4.51 | 2.91 | 3.11 | 3.11 | 2.91  | 2.91  | 2.91  | 2.91  | 2.91  | 2.91  | 2.91  | 3.31  | 3.31  | 5.51  | 5.51  | 5.21  | 5.21  |      |
| Priceline                 | 3.61 | 3.31 | 3.81 | 3.81 | 3.61 | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  |      |
| Teboon                    | 3.21 | 3.31 | 3.51 | 4.01 | 5.21 | 4.91  | 3.71  | 4.31  | 4.71  | 3.01  | 3.01  | 3.01  | 4.01  | 4.01  | 3.51  | 6.71  | 6.71  | 6.71  |      |
| Toole                     | 4.11 | 6.21 | 5.71 | 4.51 | 5.21 | 5.41  | 5.91  | 6.21  | 6.81  | 5.31  | 5.61  | 5.71  | 7.21  | 8.01  | 7.51  | 8.01  | 7.71  | 7.71  |      |
| Great Falls Region        | 4.01 | 4.81 | 5.11 | 5.41 | 5.71 | 5.51  | 6.41  | 6.41  | 6.31  | 7.31  | 7.31  | 7.31  | 7.21  | 7.21  | 8.71  | 8.71  | 8.71  | 8.71  |      |
| Cascade                   | 4.11 | 4.31 | 5.21 | 5.71 | 5.51 | 5.51  | 2.71  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 2.41  | 2.41  | 3.61  | 3.61  | 3.61  | 3.61  |      |
| Chouteau                  | 2.11 | 2.91 | 3.21 | 3.21 | 3.31 | 3.41  | 6.01  | 6.91  | 8.51  | 9.51  | 9.51  | 12.11 | 11.81 | 11.41 | 12.31 | 11.51 | 11.51 | 11.51 |      |
| Glacier                   | 5.81 | 5.21 | 4.41 | 4.41 | 5.01 | 5.01  | 4.81  | 4.81  | 4.31  | 4.31  | 4.31  | 3.71  | 3.71  | 6.31  | 6.81  | 7.11  | 7.11  | 7.11  |      |
| Pondera                   | 3.71 | 5.11 | 5.61 | 5.41 | 4.81 | 4.81  | 4.31  | 4.31  | 4.31  | 4.31  | 4.31  | 5.31  | 5.31  | 4.81  | 5.51  | 5.91  | 5.21  | 5.21  |      |
| Teboon                    | 2.81 | 3.61 | 5.21 | 5.21 | 4.01 | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  | 4.71  |      |
| Toole                     | 4.11 | 6.21 | 5.71 | 4.51 | 3.71 | 4.21  | 4.21  | 4.21  | 4.01  | 4.61  | 4.61  | 5.01  | 5.01  | 5.01  | 5.01  | 7.21  | 6.71  | 6.71  |      |
| Havre Region              | 4.21 | 4.41 | 4.41 | 4.31 | 4.21 | 4.81  | 4.61  | 5.31  | 5.31  | 5.31  | 5.31  | 5.31  | 6.71  | 7.81  | 8.11  | 8.31  | 8.31  | 8.31  |      |
| Baine Hill                | 5.11 | 4.01 | 3.11 | 4.11 | 3.41 | 3.41  | 6.01  | 6.01  | 5.61  | 5.61  | 4.71  | 4.71  | 5.81  | 6.41  | 7.71  | 7.71  | 7.71  | 7.71  |      |
| Liberty                   | 3.31 | 3.21 | 3.91 | 3.41 | 3.41 | 3.41  | 3.21  | 3.21  | 4.11  | 3.21  | 3.21  | 3.11  | 3.41  | 4.01  | 5.21  | 5.61  | 4.31  | 4.31  |      |
| Helena Region             | 3.51 | 3.91 | 3.91 | 4.51 | 5.01 | 5.01  | 5.41  | 5.01  | 5.41  | 5.41  | 5.41  | 5.41  | 5.41  | 5.41  | 6.01  | 6.51  | 6.81  | 6.81  |      |
| Broadwater                | 2.91 | 2.71 | 3.91 | 3.61 | 4.31 | 8.31  | 10.01 | 7.61  | 7.61  | 7.61  | 7.61  | 7.61  | 7.61  | 7.61  | 7.61  | 11.21 | 6.01  | 6.01  |      |
| Jefferson                 | 4.41 | 4.41 | 6.01 | 6.01 | 6.91 | 4.21  | 4.71  | 4.01  | 4.61  | 4.61  | 5.01  | 5.01  | 5.01  | 5.01  | 5.01  | 6.71  | 6.71  | 6.71  |      |
| Lewis & Clark             | 3.41 | 3.71 | 3.71 | 4.31 | 4.31 | 4.31  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  |      |
| Kalispell Region          | 7.31 | 7.31 | 7.21 | 7.01 | 6.91 | 9.01  | 10.41 | 9.01  | 9.01  | 8.71  | 8.71  | 9.41  | 10.71 | 13.71 | 10.81 | 9.01  | 9.51  | 9.91  |      |
| Flathead                  | 7.01 | 6.71 | 5.51 | 7.21 | 9.11 | 10.21 | 9.11  | 9.11  | 9.11  | 7.31  | 7.31  | 8.31  | 10.11 | 12.91 | 10.51 | 7.01  | 7.31  | 7.31  |      |
| Lake                      | 6.71 | 6.71 | 5.41 | 6.41 | 8.11 | 7.11  | 12.11 | 13.11 | 12.81 | 6.81  | 6.81  | 7.41  | 7.41  | 9.71  | 8.91  | 8.91  | 8.91  | 8.91  |      |
| Lincoln                   | 8.91 | 9.11 | 9.01 | 9.21 | 9.21 | 14.31 | 14.31 | 14.31 | 14.31 | 10.41 | 10.41 | 15.41 | 15.41 | 19.41 | 13.41 | 12.81 | 11.81 | 11.81 |      |
| Petroleum                 | 2.91 | 5.11 | 5.71 | 4.81 | 2.21 | 4.01  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  | 1.71  |      |
| Wheatland                 | 3.21 | 3.91 | 4.91 | 5.01 | 5.01 | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 3.11  | 6.31  | 6.31  | 6.31  |      |
| Miles City Region         | 2.91 | 3.21 | 3.41 | 3.21 | 2.91 | 2.91  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 3.61  | 7.31  | 7.71  | 7.71  |      |
| Fergus                    | 3.11 | 1.91 | 4.11 | 4.51 | 4.51 | 4.21  | 4.21  | 4.21  | 4.21  | 4.51  | 4.51  | 4.51  | 4.51  | 4.51  | 4.51  | 4.51  | 3.61  | 3.61  |      |
| Golden Valley             | 5.11 | 6.31 | 3.91 | 4.81 | 3.81 | 3.81  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 4.21  | 9.41  | 9.41  | 9.41  |      |
| Judith Basin              | 2.01 | 3.21 | 3.91 | 3.41 | 2.51 | 2.61  | 2.71  | 2.71  | 2.71  | 2.71  | 2.71  | 2.71  | 2.71  | 2.71  | 2.71  | 7.01  | 7.31  | 7.31  |      |
| Powder River              | 1.41 | 1.91 | 1.01 | 2.21 | 2.41 | 2.01  | 2.51  | 2.51  | 2.51  | 2.51  | 2.51  | 2.51  | 2.51  | 2.51  | 2.51  | 6.01  | 6.01  | 6.01  |      |
| Rosebud                   | 3.11 | 3.01 | 3.21 | 3.21 | 3.21 | 3.61  | 3.61  | 3.61  | 3.61  | 5.71  | 5.71  | 5.71  | 5.71  | 5.71  | 5.71  | 12.71 | 11.41 | 11.41 |      |
| Treasure                  | 3.21 | 3.21 | 3.21 | 2.51 | 5.51 | 5.81  | 4.61  | 4.61  | 4.61  | 4.61  | 4.61  | 4.61  | 4.61  | 4.61  | 4.61  | 6.31  | 4.71  | 5.01  |      |
| Missoula Region           | 5.21 | 4.81 | 5.01 | 6.41 | 8.11 | 10.41 | 8.61  | 8.61  | 7.81  | 7.81  | 7.81  | 10.81 | 12.81 | 10.51 | 8.01  | 8.01  | 8.01  | 8.01  |      |
| Mineral                   | 6.21 | 6.21 | 6.71 | 7.51 | 9.61 | 11.11 | 8.61  | 8.61  | 8.61  | 8.61  | 8.61  | 10.41 | 12.81 | 10.51 | 13.01 | 13.01 | 13.01 | 13.01 |      |
| Missoula                  | 4.71 | 4.31 | 4.51 | 5.11 | 6.01 | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  | 7.41  |      |
| Ravalli                   | 6.71 | 6.81 | 6.61 | 6.21 | 7.51 | 10.41 | 9.81  | 9.81  | 9.81  | 9.81  | 9.81  | 10.41 | 10.41 | 10.41 | 10.41 | 10.41 | 10.41 | 10.41 |      |

Source: Research and Analysis Bureau, Montana Department of Labor and Industry.  
Regional unemployment rates computed by the Office of Research & Information Services,  
Montana Department of Commerce, 1988.

Figure 2.7

## UNEMPLOYMENT RATE--MONTANA

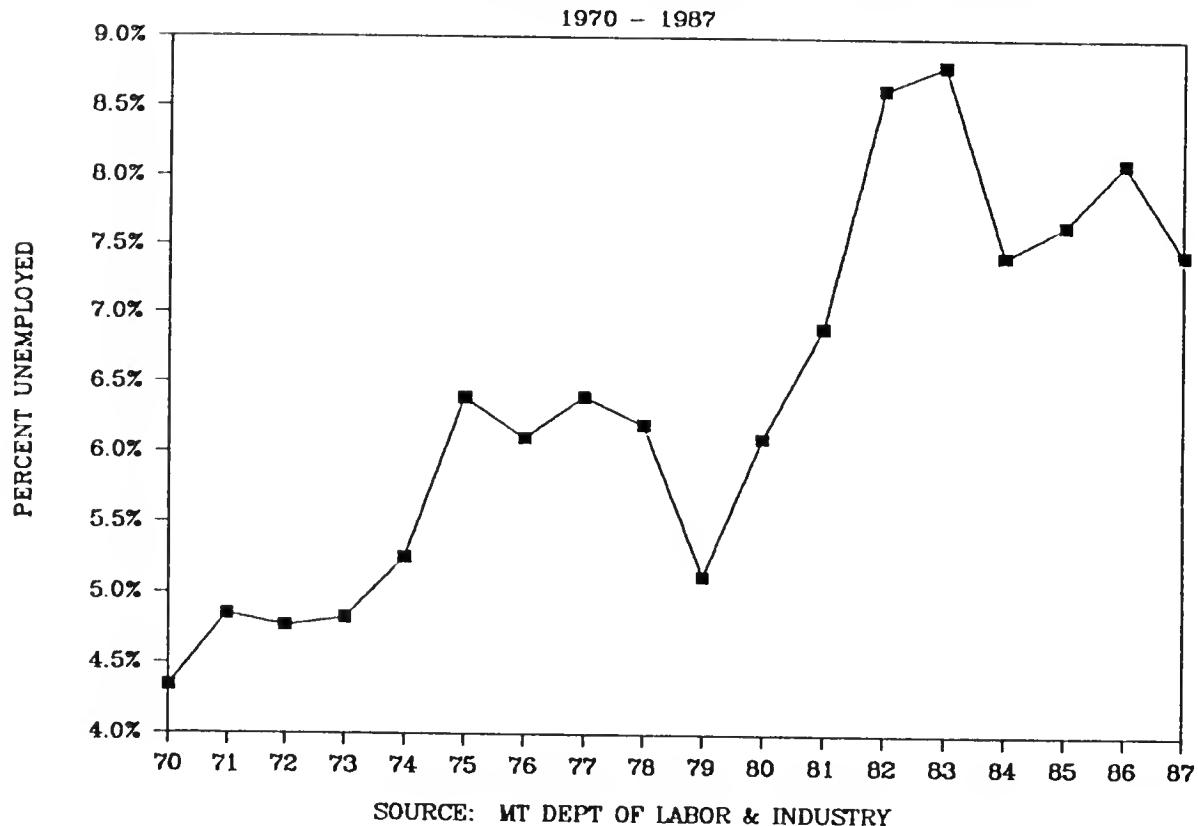


Figure 2.8

## UNEMPLOYMENT RATES IN MONTANA REGIONS 1987

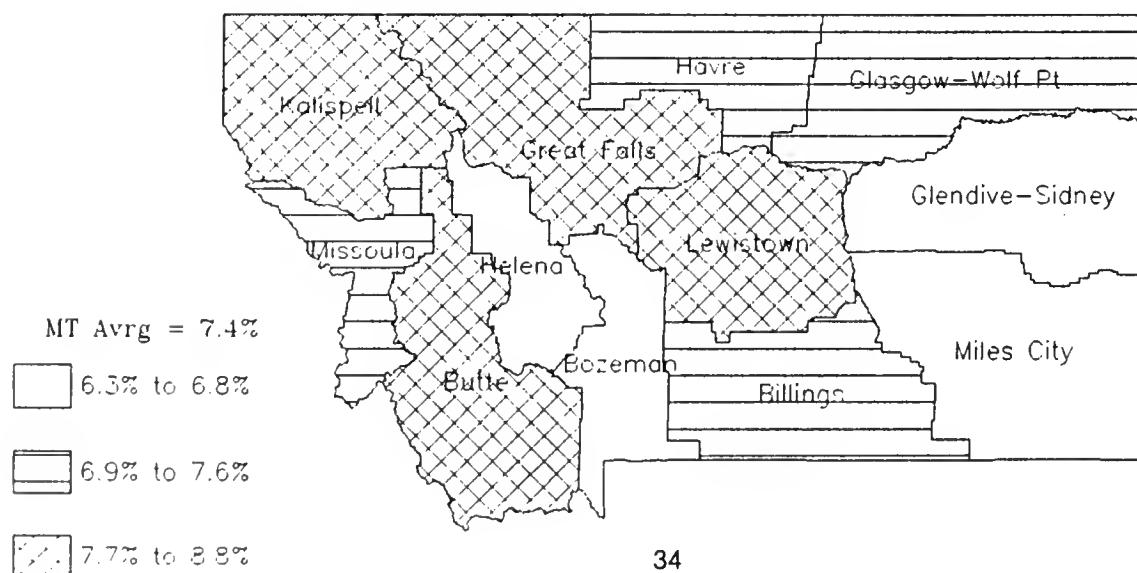


Figure 2.9

## EMPLOYMENT--MONTANA

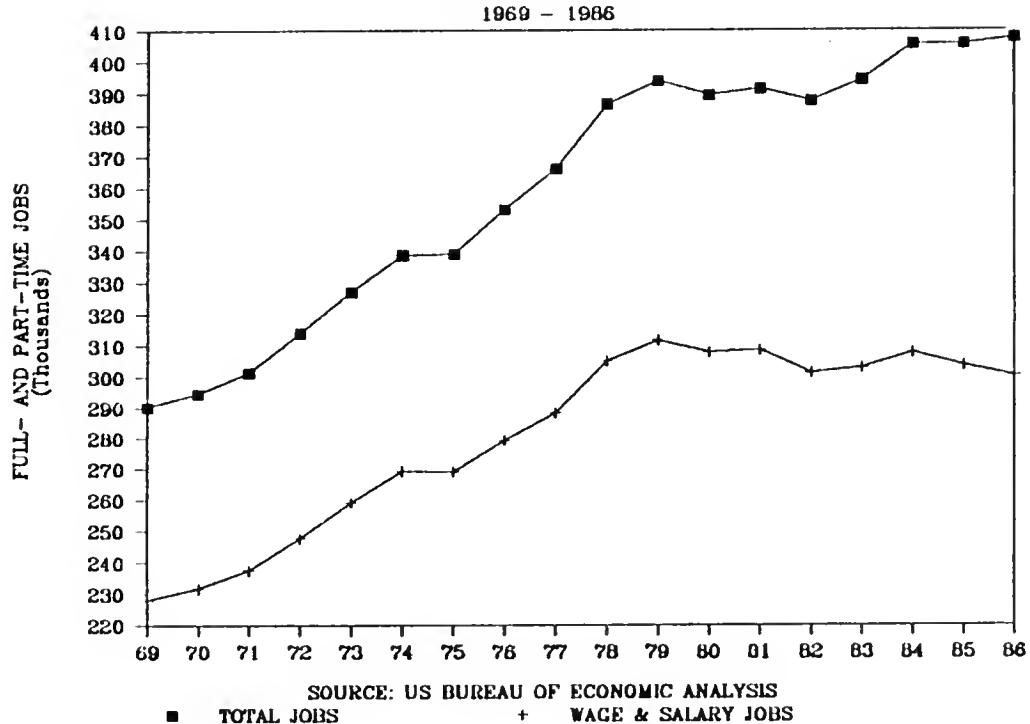


Figure 2.10

## POPULATION--MONTANA

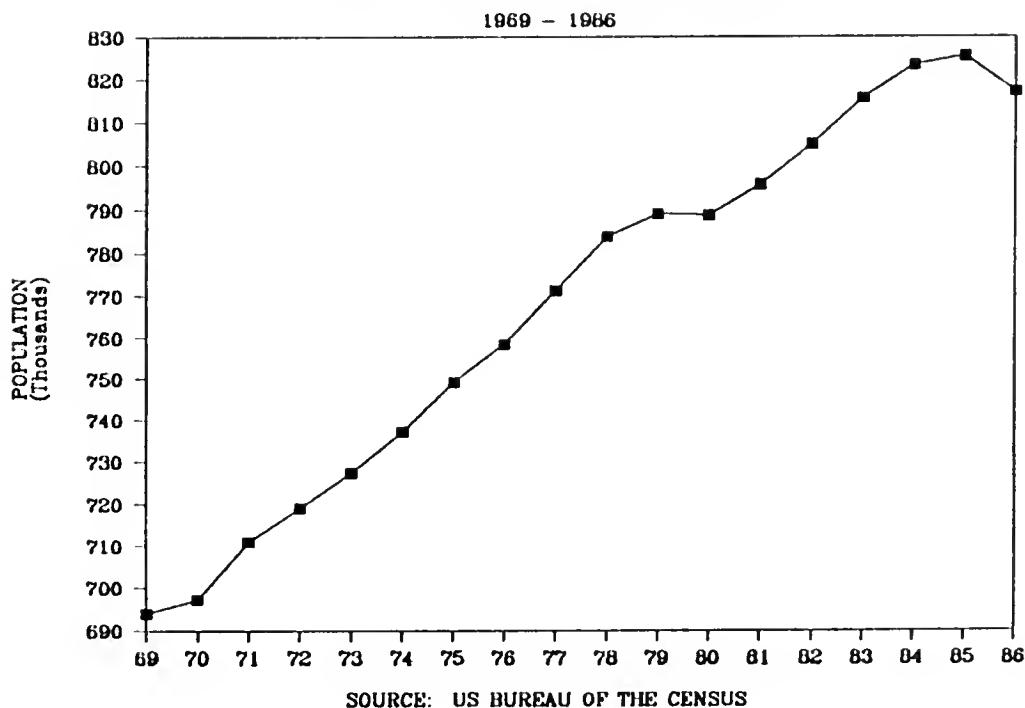


Table 2.8

POPULATION IN MONTANA AND IN REGIONS IN MONTANA:  
EARLIEST CENSUSES TO 1967

|                      | Decennial Censuses |         |         |         |         |         |         |         |         |         |         | Estimate |
|----------------------|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|
|                      | 1890               | 1900    | 1910    | 1920    | 1930    | 1940    | 1950    | 1960    | 1970    | 1980    | 1967    |          |
| Montana              | 162,926            | 243,329 | 378,053 | 548,889 | 537,606 | 539,456 | 591,024 | 674,787 | 694,409 | 786,690 | 809,000 |          |
| Billings Region      | 2,063              | 16,831  | 40,935  | 44,430  | 62,096  | 72,579  | 84,977  | 106,134 | 112,116 | 134,044 | 146,700 |          |
| Big Horn             | ...                | ...     | ...     | 7,015   | 8,563   | 10,419  | 9,826   | 10,007  | 10,057  | 11,096  | 11,000  |          |
| Carbon               | ...                | 7,353   | 13,962  | 15,279  | 12,571  | 11,063  | 10,261  | 8,317   | 7,080   | 8,099   | 8,300   |          |
| Stillwater           | ...                | ...     | ...     | 7,630   | 6,253   | 5,694   | 5,416   | 5,328   | 4,632   | 5,358   | 6,200   |          |
| Sweet Grass          | ...                | 3,006   | 4,029   | 4,926   | 3,944   | 3,719   | 3,621   | 3,290   | 2,900   | 3,216   | 3,100   |          |
| Yellowstone          | 2,065              | 6,212   | 22,964  | 29,600  | 30,785  | 41,182  | 53,873  | 79,016  | 87,347  | 108,035 | 118,100 |          |
| Bismarck Region      | 17,876             | 19,420  | 29,006  | 29,816  | 29,370  | 32,115  | 34,035  | 51,376  | 53,348  | 57,954  | 63,100  |          |
| Cavalier             | 6,246              | 9,353   | 16,079  | 15,864  | 16,126  | 10,369  | 21,702  | 26,043  | 32,505  | 42,663  | 48,700  |          |
| Hoover               | 6,748              | 2,526   | 6,190   | 2,622   | 2,272   | 2,237   | 2,079   | 2,616   | 2,122   | 2,154   | 2,100   |          |
| Park                 | 6,841              | 7,341   | 10,751  | 11,330  | 10,974  | 11,609  | 12,057  | 13,213  | 11,261  | 12,933  | 12,300  |          |
| Butte Region         | 48,246             | 82,664  | 92,337  | 101,376 | 95,454  | 90,824  | 86,718  | 87,513  | 80,251  | 75,902  | 67,200  |          |
| Deer Lodge           | 6,611              | 5,613   | 6,544   | 7,349   | 6,034   | 6,963   | 6,671   | 7,194   | 8,187   | 8,186   | 8,400   |          |
| Granite              | 13,153             | 17,395  | 12,988  | 15,323  | 16,293  | 13,627  | 16,333  | 18,640  | 19,632  | 12,318  | 10,000  |          |
| Madison              | 6,692              | 7,692   | 7,229   | 7,495   | 6,323   | 7,294   | 5,990   | 5,211   | 5,816   | 5,448   | 5,700   |          |
| Powell               | ...                | ...     | 3,904   | 6,909   | 6,202   | 6,132   | 6,301   | 7,002   | 6,640   | 6,936   | 6,900   |          |
| Silver Bow           | 23,764             | 67,635  | 56,848  | 60,313  | 58,369  | 51,207  | 46,422  | 46,654  | 61,961  | 34,092  | 33,700  |          |
| Glasgow Region       | ...                | 4,315   | 13,630  | 43,047  | 45,403  | 45,256  | 37,887  | 43,051  | 38,084  | 34,333  | 33,000  |          |
| Bonnie               | ...                | ...     | ...     | ...     | 3,553   | 6,563   | 3,946   | 3,793   | 3,043   | 2,833   | 2,600   |          |
| Phillips             | ...                | ...     | ...     | 9,311   | 8,208   | 7,592   | 6,334   | 6,027   | 5,346   | 5,367   | 5,400   |          |
| Roosevelt            | ...                | ...     | ...     | 10,367  | 10,673  | 9,804   | 9,180   | 11,731  | 10,363  | 10,447  | 11,200  |          |
| Sheridan             | ...                | ...     | ...     | 13,847  | 9,869   | 7,818   | 6,076   | 6,458   | 5,779   | 5,618   | 5,300   |          |
| Valley               | ...                | 6,333   | 13,630  | 11,542  | 11,181  | 12,181  | 11,353  | 17,000  | 11,471  | 10,250  | 8,400   |          |
| Glenview Region      | 2,056              | 2,443   | 12,775  | 32,027  | 35,264  | 29,837  | 29,172  | 32,134  | 28,996  | 31,718  | 29,600  |          |
| Douglas              | 2,056              | 2,443   | 12,725  | 9,239   | 9,881   | 8,618   | 9,092   | 12,314  | 11,269  | 11,805  | 10,500  |          |
| Gifford              | ...                | ...     | ...     | 5,348   | 6,292   | 2,641   | 2,172   | 1,961   | 1,796   | 1,656   | 1,600   |          |
| McCone               | ...                | ...     | ...     | 6,747   | 6,790   | 3,790   | 3,256   | 3,521   | 3,875   | 2,702   | 2,500   |          |
| Prairie              | ...                | ...     | ...     | 3,664   | 3,941   | 2,810   | 2,377   | 2,318   | 1,732   | 1,836   | 1,600   |          |
| Scholar              | ...                | ...     | ...     | 8,989   | 9,533   | 10,209  | 10,344  | 10,504  | 9,837   | 12,243  | 12,100  |          |
| Wibaux               | ...                | ...     | ...     | ...     | 2,767   | 3,161   | 1,907   | 1,698   | 1,643   | 1,476   | 1,300   |          |
| Great Falls Region   | 13,498             | 61,823  | 55,370  | 49,400  | 74,326  | 78,756  | 90,137  | 115,183 | 117,626 | 118,198 | 112,900 |          |
| Cascade              | 8,753              | 29,777  | 28,833  | 38,836  | 41,140  | 41,999  | 33,027  | 73,618  | 81,804  | 80,698  | 78,100  |          |
| Chouteau             | 6,761              | 10,966  | 17,191  | 11,051  | 8,633   | 7,316   | 6,976   | 7,348   | 8,473   | 8,092   | 5,800   |          |
| Blaine               | ...                | ...     | ...     | 6,178   | 5,297   | 9,036   | 9,643   | 11,563  | 10,783  | 10,628  | 11,200  |          |
| Pondera              | ...                | ...     | ...     | 3,741   | 6,964   | 6,710   | 6,392   | 7,053   | 6,611   | 6,731   | 6,600   |          |
| Teton                | 5,080              | 9,346   | 3,970   | 6,068   | 6,822   | 7,232   | 7,292   | 6,116   | 6,491   | 6,100   |         |          |
| Total                | ...                | ...     | ...     | 3,724   | 6,714   | 6,789   | 6,067   | 7,904   | 9,839   | 9,359   | 9,200   |          |
| Missoula Region      | ...                | ...     | ...     | 25,631  | 24,979  | 25,079  | 24,961  | 29,368  | 26,444  | 27,313  | 27,000  |          |
| Blaine               | ...                | ...     | ...     | 9,057   | 9,006   | 9,366   | 8,316   | 8,091   | 8,727   | 8,999   | 8,900   |          |
| Hill                 | ...                | ...     | ...     | 15,958  | 13,773  | 13,304  | 16,303  | 16,633  | 17,358  | 17,983  | 17,800  |          |
| Liberty              | ...                | ...     | ...     | 2,616   | 2,196   | 2,209   | 2,100   | 2,626   | 2,359   | 2,329   | 2,300   |          |
| Helena Region        | 25,171             | 27,162  | 30,945  | 27,102  | 25,095  | 30,246  | 31,476  | 33,107  | 41,043  | 33,333  | 58,800  |          |
| Broadwater           | ...                | 2,641   | 3,691   | 3,259   | 3,738   | 3,431   | 2,922   | 2,804   | 2,526   | 3,267   | 3,700   |          |
| Jefferson            | 8,026              | 9,330   | 5,601   | 5,203   | 6,133   | 6,664   | 6,016   | 6,297   | 5,238   | 7,029   | 8,300   |          |
| Louis & Clark        | 19,143             | 19,171  | 21,833  | 18,660  | 16,824  | 23,151  | 24,340  | 28,006  | 33,281  | 43,039  | 44,800  |          |
| Kalispell Region     | ...                | 9,375   | 26,156  | 34,405  | 61,322  | 52,349  | 61,006  | 63,486  | 79,061  | 97,449  | 107,000 |          |
| Flathead             | ...                | 9,375   | 10,705  | 21,705  | 10,200  | 26,271  | 31,492  | 32,765  | 30,440  | 31,946  | 38,200  |          |
| Lake                 | ...                | ...     | ...     | ...     | 9,341   | 13,498  | 13,833  | 13,104  | 14,443  | 19,056  | 21,000  |          |
| Lincoln              | ...                | ...     | 3,436   | 7,797   | 7,089   | 7,042   | 8,493   | 12,537  | 18,063  | 17,752  | 19,000  |          |
| Sanders              | ...                | ...     | 3,713   | 6,903   | 5,692   | 6,926   | 6,963   | 6,880   | 7,093   | 8,675   | 8,800   |          |
| Lolo-Clarkson Region | 3,316              | 6,937   | 17,385  | 43,993  | 36,933  | 29,346  | 28,173  | 27,114  | 25,167  | 28,190  | 23,200  |          |
| Fergus               | 3,314              | 6,937   | 17,385  | 20,344  | 16,331  | 16,040  | 16,015  | 14,018  | 12,611  | 15,076  | 12,300  |          |
| Golden Valley        | ...                | ...     | ...     | ...     | 2,126   | 1,607   | 1,337   | 1,203   | 931     | 1,026   | 1,100   |          |
| Judith Basin         | ...                | ...     | ...     | ...     | 3,238   | 3,653   | 3,200   | 3,085   | 2,667   | 2,644   | 2,500   |          |
| Musselshell          | ...                | ...     | ...     | 12,050  | 7,242   | 5,717   | 5,406   | 6,848   | 5,754   | 6,428   | 6,500   |          |
| Petroleum            | ...                | ...     | ...     | ...     | 2,045   | 1,043   | 1,026   | 994     | 675     | 611     | 600     |          |
| Wheatland            | ...                | ...     | ...     | 3,619   | 3,751   | 3,204   | 3,187   | 3,024   | 3,329   | 3,339   | 3,200   |          |
| Billings City Region | 3,308              | 7,491   | 22,108  | 34,063  | 52,863  | 28,556  | 29,784  | 29,734  | 27,148  | 32,071  | 33,400  |          |
| Carter               | ...                | ...     | ...     | 3,972   | 6,134   | 3,200   | 2,790   | 2,493   | 1,956   | 1,799   | 1,700   |          |
| Custer               | 3,308              | 7,891   | 14,123  | 12,196  | 11,342  | 10,422  | 12,461  | 13,227  | 12,178  | 11,109  | 12,700  |          |
| Teton                | ...                | ...     | ...     | 4,548   | 4,568   | 3,719   | 3,446   | 3,997   | 4,050   | 3,763   | 3,500   |          |
| Poudre River         | ...                | ...     | ...     | 3,357   | 3,909   | 3,159   | 2,693   | 2,483   | 2,862   | 2,520   | 2,300   |          |
| Reserve              | ...                | ...     | 7,902   | 8,002   | 7,347   | 6,477   | 6,370   | 6,187   | 5,037   | 9,899   | 12,300  |          |
| Treasure             | ...                | ...     | ...     | 1,900   | 1,661   | 1,499   | 1,402   | 1,343   | 1,049   | .761    | 1,000   |          |
| Missoula Region      | 16,427             | 21,786  | 35,342  | 36,446  | 33,723  | 64,151  | 50,675  | 60,041  | 75,630  | 102,184 | 107,100 |          |
| Mineral              | ...                | ...     | ...     | 2,327   | 1,626   | 2,155   | 8,081   | 3,037   | 2,950   | 3,075   | 3,500   |          |
| Missoula             | 16,427             | 13,964  | 25,396  | 26,061  | 21,762  | 29,050  | 33,495  | 64,665  | 38,263  | 76,014  | 75,400  |          |
| Revolt               | ...                | 7,323   | 11,666  | 18,098  | 10,313  | 12,970  | 13,181  | 12,341  | 14,409  | 22,693  | 23,200  |          |

... Not Applicable

Note: In 1890 the sum of counties is not the state total; the difference is Indian reservations. In 1900 the Crow Reservation is not included in county data.

Sources: U.S. Bureau of the Census. Compiled by the Office of Research and Information Services, Montana Department of Commerce, 1968.

Table 2.9

TOTAL PERSONAL INCOME IN MONTANA BY REGION AND COUNTY\*

(Thousands of 1987 dollars)

| REGION                    | 1959        | 1969        | 1979        | 1980        | 1981        | 1982        | 1983        | 1984        | 1985        | 1986         | 1987<br>Estimate |
|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|------------------|
| <hr/>                     |             |             |             |             |             |             |             |             |             |              |                  |
| Montana                   | \$4,867,194 | \$6,488,253 | \$9,823,543 | \$9,713,950 | \$9,926,465 | \$9,701,034 | \$9,761,929 | \$9,863,245 | \$9,758,980 | \$10,120,952 | \$10,048,000     |
| Billings Region           | 836,456     | 1,097,914   | 1,862,145   | 1,859,532   | 1,887,774   | 1,905,800   | 1,929,641   | 1,972,854   | 1,955,255   | 1,971,015    | 1,956,000        |
| Big Horn                  | 52,678      | 77,850      | 117,923     | 127,215     | 150,571     | 116,285     | 110,317     | 113,355     | 111,417     | 124,778      |                  |
| Carbon                    | 47,992      | 63,067      | 90,012      | 93,776      | 96,980      | 91,964      | 89,180      | 88,974      | 90,359      | 94,574       |                  |
| Stillwater                | 36,057      | 46,328      | 66,466      | 69,783      | 70,797      | 69,511      | 71,396      | 73,557      | 70,576      | 73,705       |                  |
| Sweet Grass               | 18,794      | 27,776      | 42,820      | 40,963      | 40,755      | 37,902      | 38,584      | 39,674      | 39,150      | 42,834       |                  |
| Yellowstone               | 680,935     | 862,892     | 1,544,924   | 1,527,795   | 1,550,674   | 1,590,154   | 1,620,165   | 1,657,095   | 1,643,153   | 1,635,124    |                  |
| Bozeman Region            | 286,130     | 361,540     | 665,098     | 659,600     | 679,128     | 681,681     | 704,038     | 733,860     | 742,182     | 759,885      | 752,000          |
| Gallatin                  | 179,664     | 248,202     | 474,198     | 478,270     | 492,505     | 500,563     | 523,057     | 550,263     | 559,436     | 566,663      |                  |
| Meagher                   | 19,053      | 18,517      | 27,007      | 23,805      | 24,870      | 23,507      | 22,793      | 21,351      | 19,261      | 25,046       |                  |
| Park                      | 87,413      | 94,822      | 164,493     | 157,525     | 161,752     | 157,611     | 157,587     | 162,247     | 163,466     | 168,178      |                  |
| Butte Region              | 625,416     | 674,172     | 889,760     | 845,600     | 874,673     | 840,734     | 854,105     | 812,057     | 802,394     | 827,035      | 824,000          |
| Beaverhead                | 35,466      | 68,435      | 97,287      | 90,198      | 95,090      | 92,950      | 91,838      | 91,142      | 90,081      | 99,231       |                  |
| Deer Lodge                | 108,911     | 118,465     | 138,262     | 123,650     | 117,894     | 109,470     | 111,153     | 111,872     | 109,931     | 109,938      |                  |
| Granite                   | 21,913      | 20,152      | 31,816      | 29,936      | 29,848      | 27,503      | 29,757      | 29,200      | 28,107      | 29,443       |                  |
| Madison                   | 30,719      | 39,400      | 66,266      | 60,349      | 62,401      | 55,932      | 56,131      | 58,274      | 59,695      | 45,830       |                  |
| Powell                    | 50,233      | 53,667      | 75,713      | 71,809      | 72,628      | 72,421      | 75,259      | 75,479      | 74,741      | 76,518       |                  |
| Silver Bow                | 358,156     | 374,055     | 460,416     | 469,679     | 494,811     | 482,478     | 471,968     | 448,091     | 439,838     | 446,076      |                  |
| Glasgow-Wolf Point Region | 235,175     | 340,202     | 377,458     | 386,047     | 439,487     | 399,350     | 368,707     | 365,597     | 351,291     | 414,721      | 407,000          |
| Daniels                   | 20,407      | 34,882      | 33,967      | 35,548      | 40,790      | 40,508      | 31,940      | 29,496      | 24,232      | 40,939       |                  |
| Phillips                  | 34,648      | 45,384      | 55,059      | 56,818      | 61,858      | 53,764      | 50,539      | 52,485      | 47,741      | 81,892       |                  |
| Roosevelt                 | 50,401      | 89,532      | 102,761     | 109,089     | 116,457     | 112,758     | 112,158     | 111,036     | 110,207     | 119,189      |                  |
| Sheridan                  | 36,694      | 59,109      | 63,867      | 64,799      | 83,845      | 78,136      | 70,442      | 69,156      | 66,706      | 78,308       |                  |
| Valley                    | 93,025      | 113,295     | 121,804     | 119,794     | 136,537     | 114,183     | 103,629     | 103,630     | 98,405      | 114,393      |                  |
| Gladstone-Sidney Region   | 170,238     | 277,155     | 380,608     | 417,727     | 474,127     | 437,733     | 393,421     | 388,555     | 365,250     | 583,087      | 362,000          |
| Dawson                    | 69,129      | 105,825     | 133,279     | 161,885     | 175,948     | 170,063     | 155,808     | 148,486     | 138,942     | 137,710      |                  |
| Garfield                  | 10,167      | 24,675      | 21,301      | 20,232      | 25,090      | 20,168      | 17,715      | 15,862      | 14,485      | 23,399       |                  |
| McCone                    | 13,474      | 27,946      | 29,024      | 33,445      | 36,367      | 32,990      | 27,058      | 27,100      | 26,373      | 33,092       |                  |
| Prairie                   | 12,671      | 14,646      | 19,855      | 21,533      | 21,014      | 17,882      | 16,996      | 17,865      | 14,527      | 19,778       |                  |
| Arlington                 | 53,457      | 89,916      | 141,514     | 163,719     | 196,914     | 180,299     | 163,231     | 163,911     | 157,893     | 154,296      |                  |
| Wibaux                    | 11,340      | 14,148      | 15,634      | 16,912      | 14,795      | 16,351      | 14,618      | 15,330      | 13,050      | 14,812       |                  |
| Great Falls Region        | 902,025     | 1,199,785   | 1,548,417   | 1,518,020   | 1,537,085   | 1,496,167   | 1,495,823   | 1,487,450   | 1,450,063   | 1,534,802    | 1,520,000        |
| Cascade                   | 609,753     | 837,161     | 1,119,886   | 1,075,526   | 1,060,146   | 1,051,234   | 1,068,154   | 1,090,560   | 1,070,466   | 1,081,160    |                  |
| Chouteau                  | 45,118      | 79,774      | 47,472      | 67,624      | 91,524      | 81,963      | 76,925      | 86,425      | 64,113      | 66,062       |                  |
| Glacier                   | 66,446      | 88,278      | 135,232     | 139,793     | 131,837     | 129,220     | 124,277     | 120,117     | 114,012     | 127,354      |                  |
| Pondera                   | 53,497      | 68,109      | 74,508      | 77,955      | 85,224      | 80,788      | 76,949      | 71,308      | 45,074      | 41,744       |                  |
| Teton                     | 52,809      | 64,515      | 73,049      | 75,789      | 64,690      | 76,556      | 74,229      | 70,262      | 67,284      | 82,453       |                  |
| Toole                     | 54,200      | 61,948      | 78,273      | 41,333      | 43,665      | 76,404      | 75,245      | 68,999      | 67,113      | 75,785       |                  |
| Helena Region             | 219,122     | 246,563     | 325,932     | 325,294     | 353,225     | 327,178     | 322,628     | 302,725     | 289,233     | 360,155      | 334,000          |
| Blaine                    | 45,617      | 49,319      | 69,279      | 65,379      | 72,151      | 64,497      | 65,253      | 62,264      | 59,615      | 72,187       |                  |
| Hill                      | 144,724     | 166,907     | 226,508     | 226,938     | 242,077     | 227,675     | 222,992     | 213,102     | 202,640     | 227,524      |                  |
| Liberty                   | 28,780      | 50,538      | 50,145      | 32,977      | 38,997      | 35,006      | 36,343      | 27,359      | 26,977      | 40,444       |                  |
| Helena Region             | 285,242     | 418,515     | 706,262     | 709,296     | 716,726     | 722,491     | 732,126     | 743,740     | 760,712     | 769,973      | 785,000          |
| Broadwater                | 17,459      | 19,650      | 37,472      | 34,267      | 32,601      | 50,794      | 32,263      | 32,043      | 31,243      | 38,299       |                  |
| Jefferson                 | 25,913      | 40,059      | 85,922      | 87,202      | 68,412      | 90,016      | 95,059      | 98,166      | 100,640     | 105,368      |                  |
| Lewis & Clark             | 241,871     | 358,806     | 582,862     | 547,427     | 595,713     | 601,681     | 604,804     | 613,531     | 628,828     | 626,507      |                  |
| Kalispell Region          | 480,838     | 689,941     | 1,135,365   | 1,088,855   | 1,077,124   | 1,046,769   | 1,110,956   | 1,160,645   | 1,162,918   | 1,178,512    | 1,190,000        |
| Flathead                  | 254,983     | 367,321     | 675,835     | 650,335     | 639,455     | 620,296     | 657,919     | 700,739     | 704,309     | 701,786      |                  |
| Lake                      | 71,489      | 101,776     | 185,227     | 183,096     | 179,729     | 177,603     | 187,791     | 194,936     | 201,469     | 213,326      |                  |
| Lincoln                   | 110,047     | 168,014     | 188,607     | 170,721     | 177,385     | 170,117     | 183,796     | 179,781     | 176,496     | 182,662      |                  |
| Sanders                   | 44,319      | 52,650      | 85,696      | 84,703      | 80,555      | 78,753      | 81,451      | 85,189      | 78,644      | 80,940       |                  |
| Lewistown Region          | 179,180     | 233,311     | 297,700     | 288,570     | 297,398     | 269,444     | 265,321     | 260,388     | 251,307     | 283,118      | 271,000          |
| Fergus                    | 95,922      | 123,916     | 166,661     | 160,298     | 161,694     | 145,682     | 145,224     | 140,808     | 135,592     | 150,017      |                  |
| Golden Valley             | 7,673       | 9,015       | 10,949      | 10,850      | 12,038      | 11,147      | 10,156      | 11,236      | 11,114      | 14,341       |                  |
| Judith Basin              | 24,751      | 29,671      | 28,145      | 27,141      | 27,272      | 24,199      | 25,787      | 26,471      | 24,436      | 29,477       |                  |
| Musselshell               | 26,334      | 37,331      | 56,127      | 58,199      | 61,210      | 57,485      | 55,079      | 52,362      | 50,681      | 52,358       |                  |
| Petroleum                 | 5,346       | 5,663       | 5,925       | 4,693       | 6,224       | 4,527       | 3,627       | 3,382       | 3,709       | 6,301        |                  |
| Wheatland                 | 19,153      | 27,736      | 29,893      | 27,809      | 26,960      | 26,605      | 25,447      | 26,550      | 25,774      | 30,424       |                  |
| Miles City Region         | 189,942     | 283,267     | 416,337     | 426,696     | 438,079     | 443,453     | 432,802     | 414,617     | 395,594     | 408,117      | 395,000          |
| Carter                    | 12,934      | 23,460      | 23,732      | 20,987      | 18,462      | 15,287      | 15,120      | 15,621      | 14,549      | 20,709       |                  |
| Euster                    | 94,590      | 128,309     | 141,145     | 185,531     | 175,808     | 168,826     | 170,638     | 174,986     | 173,725     | 171,253      |                  |
| Fallon                    | 22,058      | 37,007      | 54,441      | 59,566      | 56,827      | 53,020      | 48,274      | 49,179      | 46,017      | 45,971       |                  |
| Powder River              | 17,311      | 29,184      | 36,518      | 33,550      | 33,970      | 50,314      | 22,865      | 26,448      | 24,808      | 29,920       |                  |
| Rosebud                   | 34,714      | 51,015      | 103,594     | 111,022     | 141,853     | 165,641     | 160,418     | 137,010     | 124,584     | 126,192      |                  |
| Treasure                  | 8,335       | 14,092      | 14,907      | 15,458      | 15,759      | 12,365      | 12,487      | 11,173      | 11,911      | 14,071       |                  |
| Missoula Region           | 457,430     | 665,906     | 1,217,862   | 1,168,895   | 1,151,039   | 1,150,235   | 1,172,358   | 1,220,575   | 1,232,801   | 1,250,531    | 1,251,000        |
| Mineral                   | 16,101      | 25,063      | 36,888      | 34,259      | 34,525      | 31,719      | 36,078      | 36,685      | 35,743      | 34,359       |                  |
| Riverton                  | 359,258     | 527,916     | 950,248     | 925,935     | 886,221     | 872,566     | 898,863     | 937,866     | 945,017     | 957,082      |                  |
| Jefferson                 | 82,070      | 112,907     | 230,727     | 228,703     | 230,293     | 225,949     | 237,417     | 246,004     | 252,041     | 259,090      |                  |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.10

| Change in Total Personal Income by Region and County<br>(in constant dollars) |                             |                             |                             |       |        |       |
|-------------------------------------------------------------------------------|-----------------------------|-----------------------------|-----------------------------|-------|--------|-------|
| REGION                                                                        | Average<br>Annual<br>Change | Average<br>Annual<br>Change | Average<br>Annual<br>Change |       |        |       |
| 1959-1969                                                                     | 1969-1979                   | 1979-1986                   |                             |       |        |       |
| Montana                                                                       | 35.3%                       | 3.3%                        | 51.4%                       | 5.1%  | 3.0%   | 0.3%  |
| Billings Region                                                               | 31.3%                       | 3.1%                        | 68.6%                       | 7.0%  | 5.8%   | 0.6%  |
| Big Horn                                                                      | 47.8%                       | 4.8%                        | 51.5%                       | 5.1%  | 5.8%   | 0.6%  |
| Carbon                                                                        | 31.4%                       | 3.1%                        | 42.7%                       | 4.3%  | 5.1%   | 0.5%  |
| Stillwater                                                                    | 28.5%                       | 2.8%                        | 43.5%                       | 4.3%  | 10.9%  | 1.1%  |
| Sweet Grass                                                                   | 47.8%                       | 4.8%                        | 54.2%                       | 5.4%  | 0.0%   | 0.0%  |
| Yellowstone                                                                   | 29.7%                       | 3.0%                        | 75.0%                       | 7.3%  | 5.8%   | 0.6%  |
| Bozeman Region                                                                | 26.4%                       | 2.6%                        | 84.1%                       | 8.4%  | 14.1%  | 1.4%  |
| Gallatin                                                                      | 38.1%                       | 5.8%                        | 91.1%                       | 9.1%  | 19.5%  | 1.9%  |
| Madison                                                                       | -2.6%                       | -0.3%                       | 45.9%                       | 4.6%  | -7.3%  | -0.7% |
| Park                                                                          | 8.5%                        | 0.6%                        | 75.5%                       | 7.3%  | 2.2%   | 0.2%  |
| Butte Region                                                                  | 7.8%                        | 0.6%                        | 32.0%                       | 3.2%  | -7.0%  | -0.7% |
| Beaverhead                                                                    | 23.4%                       | 2.5%                        | 42.2%                       | 4.2%  | 2.0%   | 0.2%  |
| Deer Lodge                                                                    | 6.8%                        | 0.9%                        | 16.7%                       | 1.7%  | -20.5% | -2.0% |
| Granite                                                                       | -8.0%                       | -0.8%                       | 57.9%                       | 5.8%  | -7.5%  | -0.7% |
| Madison                                                                       | 28.3%                       | 2.8%                        | 68.2%                       | 6.8%  | -0.7%  | -0.1% |
| Powell                                                                        | 6.8%                        | 0.7%                        | 41.1%                       | 4.1%  | 1.1%   | 0.1%  |
| Silver Bow                                                                    | 4.4%                        | 0.4%                        | 28.4%                       | 2.8%  | -7.1%  | -0.7% |
| Glasgow-Wolf Point Region                                                     | 44.7%                       | 4.5%                        | 11.0%                       | 1.1%  | 9.9%   | 1.0%  |
| Daniels                                                                       | 70.9%                       | 7.1%                        | -2.6%                       | -0.3% | 20.5%  | 2.1%  |
| Phillips                                                                      | 25.2%                       | 2.5%                        | 26.9%                       | 2.7%  | 12.4%  | 1.2%  |
| Roosevelt                                                                     | 77.6%                       | 7.8%                        | 14.6%                       | 1.3%  | 16.0%  | 1.6%  |
| Sheridan                                                                      | 61.1%                       | 6.1%                        | 8.0%                        | 0.8%  | 22.6%  | 2.3%  |
| Valley                                                                        | 21.8%                       | 2.2%                        | 7.3%                        | 0.8%  | -6.1%  | -0.6% |
| Glendive-Sidney Region                                                        | 62.8%                       | 6.3%                        | 57.3%                       | 3.7%  | 0.7%   | 0.1%  |
| Dawson                                                                        | 53.1%                       | 5.3%                        | 44.8%                       | 4.5%  | -10.2% | -1.0% |
| Garfield                                                                      | 142.7%                      | 14.3%                       | -15.7%                      | -1.4% | 9.9%   | 1.0%  |
| McCone                                                                        | 107.4%                      | 10.7%                       | 3.9%                        | 0.4%  | 14.0%  | 1.4%  |
| Prairie                                                                       | 15.6%                       | 1.6%                        | 35.6%                       | 3.6%  | -0.4%  | -0.0% |
| Richland                                                                      | 68.2%                       | 6.8%                        | 57.4%                       | 5.7%  | 9.0%   | 0.9%  |
| Wibaux                                                                        | 24.8%                       | 2.5%                        | 10.5%                       | 1.1%  | -5.3%  | -0.5% |
| Great Falls Region                                                            | 33.0%                       | 3.5%                        | 29.1%                       | 2.9%  | -0.9%  | -0.1% |
| Cascade                                                                       | 37.3%                       | 3.7%                        | 35.8%                       | 3.4%  | -3.5%  | -0.3% |
| Chouteau                                                                      | 22.5%                       | 2.3%                        | -15.4%                      | -1.5% | 27.6%  | 2.8%  |
| Glacier                                                                       | 32.9%                       | 3.3%                        | 55.2%                       | 5.3%  | -5.7%  | -0.6% |
| Pondera                                                                       | 26.8%                       | 2.7%                        | 9.4%                        | 0.9%  | 9.8%   | 1.0%  |
| Teton                                                                         | 22.2%                       | 2.2%                        | 15.2%                       | 1.3%  | 12.9%  | 1.3%  |
| Toole                                                                         | 14.3%                       | 1.4%                        | 26.4%                       | 2.6%  | -3.2%  | -0.3% |
| Helena Region                                                                 | 12.5%                       | 1.3%                        | 32.2%                       | 3.2%  | 4.4%   | 0.4%  |
| Klaire                                                                        | 8.1%                        | 0.8%                        | 40.5%                       | 4.0%  | 4.2%   | 0.4%  |
| Hill                                                                          | 15.3%                       | 1.5%                        | 35.7%                       | 3.6%  | 0.4%   | 0.0%  |
| Liberty                                                                       | 5.4%                        | 0.5%                        | -0.6%                       | -0.1% | 34.2%  | 3.4%  |
| Helena Region                                                                 | 46.7%                       | 4.7%                        | 68.8%                       | 6.9%  | 9.0%   | 0.9%  |
| Broadwater                                                                    | 12.6%                       | 1.3%                        | 90.7%                       | 9.1%  | 2.2%   | 0.2%  |
| Jefferson                                                                     | 54.6%                       | 5.5%                        | 114.5%                      | 11.4% | 22.6%  | 2.3%  |
| Louis & Clark                                                                 | 46.3%                       | 4.8%                        | 62.4%                       | 6.2%  | 7.5%   | 0.7%  |
| Kalispell Region                                                              | 45.5%                       | 4.5%                        | 64.6%                       | 6.5%  | 3.8%   | 0.4%  |
| Flathead                                                                      | 44.1%                       | 4.4%                        | 85.9%                       | 8.4%  | 5.8%   | 0.4%  |
| Lake                                                                          | 42.4%                       | 4.2%                        | 82.0%                       | 8.2%  | 15.2%  | 1.5%  |
| Lincoln                                                                       | 52.7%                       | 5.3%                        | 12.3%                       | 1.2%  | -3.3%  | -0.3% |
| Sanders                                                                       | 16.8%                       | 1.9%                        | 62.8%                       | 6.3%  | -5.5%  | -0.6% |
| Lewistown Region                                                              | 30.2%                       | 3.0%                        | 27.6%                       | 2.6%  | -4.9%  | -0.5% |
| Fergus                                                                        | 24.2%                       | 2.9%                        | 34.5%                       | 3.4%  | -10.0% | -1.0% |
| Golden Valley                                                                 | 17.5%                       | 1.7%                        | 21.5%                       | 2.1%  | 31.0%  | 3.1%  |
| Judith Basin                                                                  | 19.9%                       | 2.0%                        | -5.1%                       | -0.5% | 4.7%   | 0.3%  |
| Musselshell                                                                   | 41.8%                       | 4.2%                        | 50.4%                       | 5.0%  | -6.4%  | -0.6% |
| Petroleum                                                                     | 5.5%                        | 0.6%                        | 5.0%                        | 0.5%  | 6.4%   | 0.6%  |
| Wheatland                                                                     | 44.8%                       | 4.5%                        | 7.8%                        | 0.8%  | 1.8%   | 0.2%  |
| Miles City Region                                                             | 49.1%                       | 4.9%                        | 47.0%                       | 4.7%  | -2.0%  | -0.2% |
| Carter                                                                        | 81.4%                       | 8.1%                        | 1.2%                        | 0.1%  | -12.7% | -1.3% |
| Custer                                                                        | 35.9%                       | 3.6%                        | 41.0%                       | 4.1%  | -5.5%  | -0.5% |
| Fallon                                                                        | 67.8%                       | 6.8%                        | 47.1%                       | 4.7%  | -15.6% | -1.6% |
| Powder River                                                                  | 68.6%                       | 6.9%                        | 32.0%                       | 3.2%  | -22.3% | -2.2% |
| Rosebud                                                                       | 47.0%                       | 4.7%                        | 103.1%                      | 10.3% | 21.8%  | 2.2%  |
| Treasure                                                                      | 68.1%                       | 6.9%                        | 5.8%                        | 0.6%  | -5.6%  | -0.6% |
| Missoula Region                                                               | 45.6%                       | 4.6%                        | 82.9%                       | 8.3%  | 2.7%   | 0.3%  |
| Mineral                                                                       | 55.8%                       | 5.6%                        | 47.1%                       | 4.7%  | -6.9%  | -0.7% |
| Missoula                                                                      | 46.9%                       | 4.7%                        | 80.0%                       | 8.0%  | 0.7%   | 0.1%  |
| Ravalli                                                                       | 37.6%                       | 3.8%                        | 104.4%                      | 10.4% | 12.3%  | 1.2%  |

Source: U.S. Bureau of Economic Analysis. Statistics computed by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.11

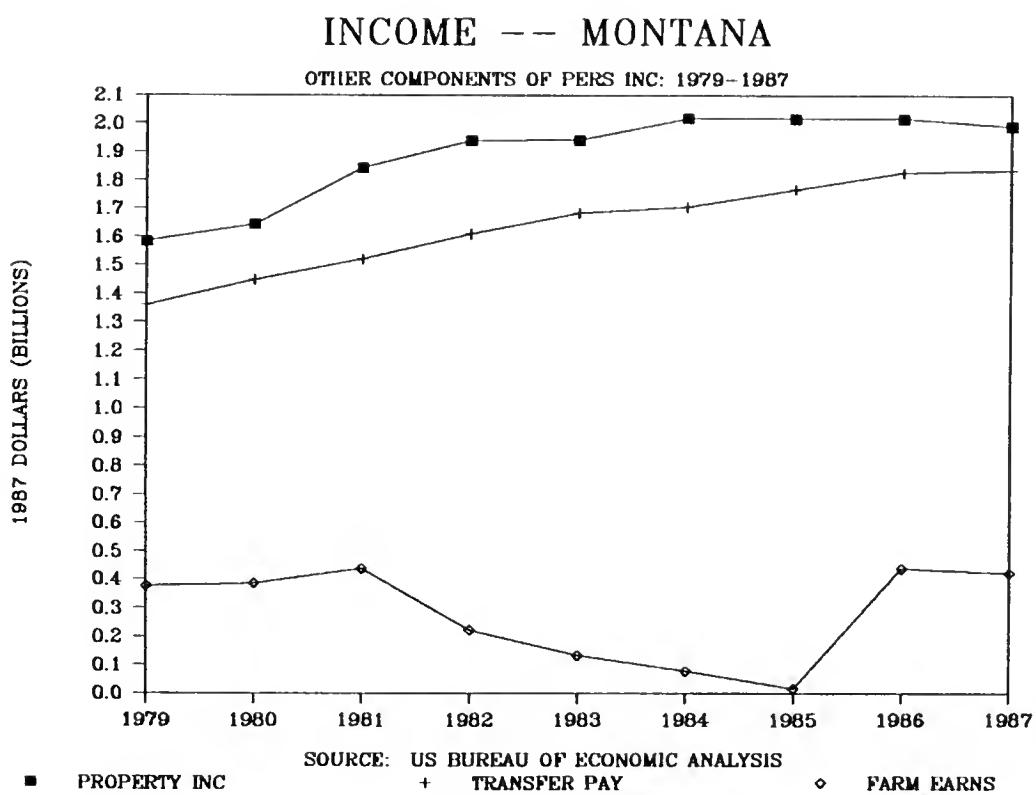
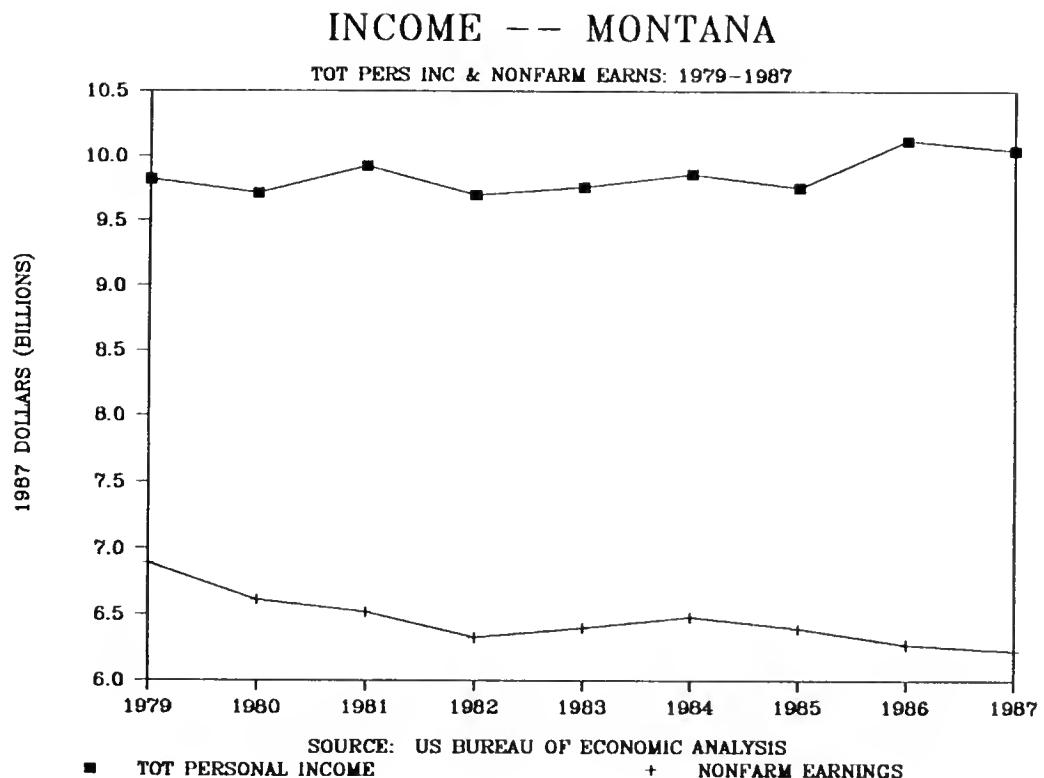
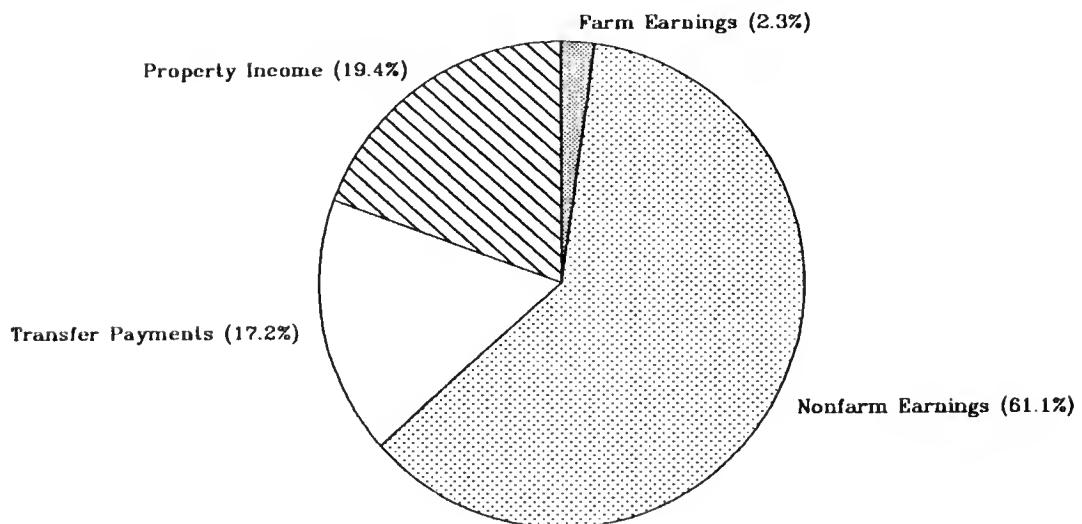


Figure 2.12

COMPOSITION OF MONTANA PERSONAL INCOME  
1984 – 1987 AVERAGE



COMPOSITION OF MONTANA PERSONAL INCOME  
1969 – 1971 AVERAGE

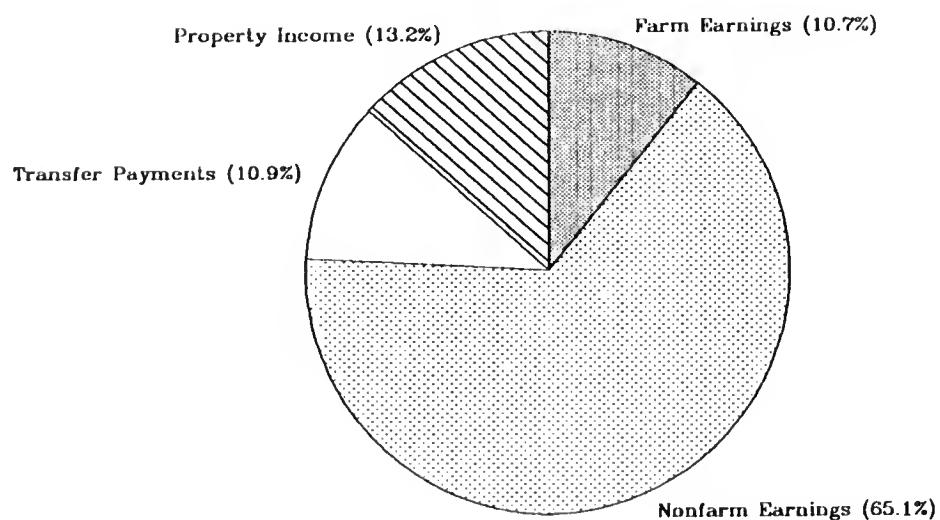


Table 2.11

|                           | NONFARM EARNINGS IN MONTANA BY REGION AND COUNTY* |             |             |             |             |             |             |             |             |             |             |
|---------------------------|---------------------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                           | (Thousands of 1987 dollars)                       |             |             |             |             |             |             |             |             |             |             |
|                           | 1959                                              | 1969        | 1979        | 1980        | 1981        | 1982        | 1983        | 1984        | 1985        | 1986        | 1987        |
| Montana                   | \$3,330,003                                       | \$4,425,024 | \$6,689,771 | \$6,610,614 | \$6,517,361 | \$6,324,936 | \$6,600,346 | \$6,480,642 | \$6,391,959 | \$6,271,302 | \$6,224,000 |
| Billings Region           | 600,981                                           | 779,621     | 1,408,352   | 1,573,423   | 1,335,282   | 1,334,778   | 1,357,356   | 1,384,823   | 1,368,480   | 1,351,437   | 1,309,000   |
| Big Horn                  | 27,785                                            | 57,465      | 102,681     | 122,177     | 94,449      | 85,076      | 82,638      | 84,159      | 85,647      | 82,206      |             |
| Carbon                    | 20,833                                            | 23,728      | 32,557      | 31,677      | 31,555      | 28,485      | 30,371      | 30,739      | 32,515      | 31,589      |             |
| Stillwater                | 13,637                                            | 15,707      | 24,517      | 25,410      | 25,464      | 22,995      | 23,747      | 25,160      | 24,993      | 26,077      |             |
| Sweet Grass               | 8,091                                             | 10,669      | 15,266      | 13,720      | 13,573      | 13,446      | 13,246      | 14,436      | 14,398      | 15,853      |             |
| Yellowstone               | 530,635                                           | 691,853     | 1,233,310   | 1,180,439   | 1,170,241   | 1,184,418   | 1,207,553   | 1,230,328   | 1,210,886   | 1,177,713   |             |
| Bozeman Region            | 179,376                                           | 243,247     | 451,499     | 452,038     | 432,941     | 440,950     | 449,455     | 475,158     | 478,826     | 473,267     | 463,000     |
| Gallatin                  | 116,744                                           | 177,580     | 332,027     | 319,497     | 323,066     | 336,861     | 346,553     | 367,657     | 374,793     | 369,622     |             |
| Heather                   | 9,760                                             | 8,429       | 11,420      | 10,382      | 9,891       | 9,475       | 9,886       | 9,447       | 9,445       | 9,356       |             |
| Park                      | 52,872                                            | 57,238      | 108,053     | 102,168     | 99,985      | 94,614      | 95,014      | 96,054      | 96,587      | 94,309      |             |
| Butte Region              | 450,271                                           | 484,127     | 590,370     | 546,297     | 553,219     | 517,339     | 509,521     | 481,067     | 476,454     | 478,267     | 479,000     |
| Beaverhead                | 27,278                                            | 35,457      | 52,452      | 52,020      | 50,090      | 50,906      | 52,954      | 53,469      | 53,330      | 55,092      |             |
| Deer Lodge                | 95,556                                            | 96,104      | 96,873      | 78,970      | 66,319      | 55,901      | 58,449      | 59,202      | 59,716      | 56,689      |             |
| Granite                   | 12,049                                            | 11,399      | 11,655      | 11,107      | 11,018      | 10,542      | 12,673      | 13,200      | 11,767      | 11,301      |             |
| Madison                   | 11,761                                            | 18,251      | 26,295      | 24,480      | 25,550      | 25,611      | 24,992      | 25,222      | 25,777      | 26,986      |             |
| Powell                    | 28,362                                            | 36,007      | 45,276      | 41,579      | 40,403      | 43,618      | 44,536      | 45,451      | 47,136      | 46,347      |             |
| Silver Bow                | 274,685                                           | 286,908     | 357,820     | 340,142     | 359,840     | 350,742     | 315,916     | 285,143     | 278,728     | 283,655     |             |
| Glasgow-Wolf Point Region | 145,065                                           | 175,619     | 232,501     | 226,944     | 235,412     | 220,488     | 213,713     | 218,885     | 210,788     | 205,861     | 203,000     |
| Daniels                   | 9,812                                             | 10,420      | 14,690      | 13,638      | 14,263      | 15,222      | 14,015      | 13,782      | 13,128      | 12,955      |             |
| Phillips                  | 14,499                                            | 17,919      | 29,357      | 30,888      | 28,800      | 27,342      | 28,895      | 35,106      | 28,588      | 31,251      |             |
| Roosevelt                 | 51,477                                            | 51,577      | 72,088      | 68,786      | 69,551      | 72,768      | 73,845      | 74,565      | 74,500      | 71,548      |             |
| Sheridan                  | 18,075                                            | 23,985      | 38,703      | 41,785      | 46,871      | 40,410      | 35,601      | 34,818      | 33,726      | 31,729      |             |
| Valley                    | 71,004                                            | 69,718      | 77,663      | 71,848      | 93,926      | 84,746      | 81,559      | 82,615      | 60,846      | 58,378      |             |
| Gladstone-Sidney Region   | 110,032                                           | 152,773     | 253,861     | 275,791     | 510,684     | 282,506     | 241,024     | 247,586     | 230,754     | 204,465     | 187,000     |
| Dawson                    | 54,530                                            | 73,006      | 112,582     | 115,886     | 126,469     | 119,617     | 105,645     | 101,594     | 96,476      | 85,670      |             |
| Garfield                  | 3,481                                             | 5,104       | 5,717       | 5,433       | 5,174       | 5,405       | 5,586       | 5,672       | 5,565       | 5,569       |             |
| McCone                    | 9,394                                             | 10,120      | 15,428      | 12,451      | 11,542      | 12,542      | 11,297      | 11,446      | 11,123      | 11,035      |             |
| Prairie                   | 5,254                                             | 4,882       | 7,546       | 9,920       | 5,952       | 5,918       | 5,912       | 5,874       | 5,755       | 5,844       |             |
| Richtland                 | 31,399                                            | 54,270      | 108,366     | 125,551     | 155,522     | 133,258     | 106,680     | 117,586     | 108,508     | 91,219      |             |
| Wibaux                    | 6,175                                             | 5,392       | 8,242       | 8,368       | 8,024       | 5,787       | 5,364       | 5,413       | 5,328       | 5,127       |             |
| Great Falls Region        | 633,912                                           | 821,840     | 1,107,929   | 1,038,969   | 992,306     | 949,782     | 952,795     | 963,413     | 938,002     | 923,752     | 915,000     |
| Cascade                   | 488,187                                           | 662,913     | 868,149     | 781,992     | 749,466     | 728,129     | 735,594     | 743,388     | 724,995     | 716,411     |             |
| Chouteau                  | 17,007                                            | 17,086      | 25,098      | 23,596      | 24,400      | 22,458      | 22,023      | 20,877      | 20,681      | 21,174      |             |
| Glacier                   | 50,553                                            | 61,414      | 110,881     | 112,482     | 97,812      | 89,427      | 86,325      | 89,171      | 84,175      | 80,400      |             |
| Pondera                   | 27,589                                            | 23,740      | 57,800      | 36,047      | 55,379      | 34,420      | 35,842      | 36,219      | 37,236      | 35,841      |             |
| Teton                     | 19,886                                            | 24,530      | 54,845      | 33,853      | 35,522      | 33,000      | 31,048      | 32,125      | 29,587      | 29,354      |             |
| Toole                     | 30,711                                            | 32,166      | 51,157      | 51,059      | 49,728      | 61,949      | 41,960      | 41,654      | 41,510      | 40,372      |             |
| Havre Region              | 113,747                                           | 135,155     | 217,333     | 204,055     | 193,859     | 185,893     | 182,314     | 185,488     | 177,876     | 174,759     | 171,000     |
| Blaine                    | 20,200                                            | 21,892      | 34,097      | 30,747      | 29,590      | 28,498      | 29,558      | 30,647      | 31,670      | 30,247      |             |
| Hill                      | 85,881                                            | 104,542     | 170,917     | 161,442     | 152,779     | 146,168     | 141,629     | 141,486     | 134,925     | 133,447     |             |
| Liberty                   | 7,666                                             | 8,721       | 12,318      | 11,866      | 11,490      | 11,227      | 11,127      | 11,355      | 11,082      | 11,064      |             |
| Helena Region             | 206,102                                           | 315,872     | 517,152     | 510,689     | 508,387     | 508,241     | 519,826     | 527,995     | 543,181     | 532,604     | 548,000     |
| Broadwater                | 7,129                                             | 9,231       | 21,073      | 16,460      | 15,305      | 14,584      | 15,708      | 15,634      | 15,130      | 14,732      |             |
| Jefferson                 | 15,054                                            | 24,384      | 27,630      | 27,370      | 27,416      | 35,556      | 36,517      | 39,894      | 42,225      | 41,000      |             |
| Lewis & Clark             | 183,919                                           | 282,058     | 468,429     | 466,838     | 465,666     | 458,101     | 467,801     | 472,642     | 485,825     | 476,872     |             |
| Kalispell Region          | 547,719                                           | 530,822     | 789,440     | 716,627     | 690,504     | 640,625     | 696,257     | 756,441     | 729,944     | 724,497     | 737,000     |
| Flathead                  | 162,225                                           | 276,482     | 492,867     | 451,420     | 428,256     | 395,914     | 425,597     | 465,965     | 464,501     | 455,227     |             |
| Lake                      | 37,567                                            | 54,856      | 90,443      | 82,967      | 82,576      | 80,529      | 86,971      | 89,566      | 96,479      | 97,587      |             |
| Lincoln                   | 97,398                                            | 184,280     | 150,871     | 128,777     | 134,053     | 120,966     | 156,789     | 131,164     | 127,817     | 130,631     |             |
| Sanders                   | 30,530                                            | 35,203      | 55,259      | 53,463      | 47,618      | 43,226      | 44,900      | 49,726      | 41,147      | 41,251      |             |
| Louistown Region          | 86,943                                            | 107,419     | 145,420     | 138,678     | 154,453     | 123,920     | 123,051     | 119,252     | 119,805     | 117,218     | 112,000     |
| Fergus                    | 50,453                                            | 61,251      | 89,674      | 84,827      | 80,036      | 73,109      | 74,855      | 71,249      | 71,953      | 70,749      |             |
| Golden Valley             | 2,305                                             | 2,115       | 2,456       | 2,367       | 2,957       | 2,536       | 2,655       | 3,577       | 3,573       | 3,976       |             |
| Judith Basin              | 6,545                                             | 7,374       | 9,662       | 8,845       | 8,695       | 8,833       | 8,579       | 8,500       | 8,444       | 8,592       |             |
| Musselshell               | 14,945                                            | 20,475      | 29,459      | 30,009      | 30,687      | 27,680      | 25,530      | 23,764      | 23,182      | 21,365      |             |
| Petroleum                 | 2,179                                             | 2,259       | 1,623       | 1,453       | 1,454       | 1,409       | 1,520       | 1,426       | 1,688       | 1,707       |             |
| Wheatland                 | 10,518                                            | 13,967      | 12,566      | 11,377      | 10,624      | 10,354      | 10,116      | 10,736      | 10,966      | 10,851      |             |
| Miles City Region         | 114,624                                           | 155,913     | 260,622     | 280,451     | 309,792     | 358,120     | 342,282     | 293,387     | 269,854     | 256,320     | 247,000     |
| Carter                    | 4,262                                             | 5,856       | 6,560       | 4,305       | 4,022       | 4,005       | 5,969       | 6,020       | 5,663       | 5,502       |             |
| Custer                    | 68,048                                            | 83,988      | 115,235     | 115,033     | 101,585     | 97,806      | 99,844      | 102,113     | 100,392     | 96,246      |             |
| Fallon                    | 15,372                                            | 22,661      | 38,810      | 42,129      | 38,051      | 36,415      | 32,122      | 32,612      | 30,564      | 27,750      |             |
| Powder River              | 5,783                                             | 10,732      | 15,332      | 15,425      | 16,059      | 17,599      | 15,166      | 13,417      | 13,314      | 12,418      |             |
| Rosebud                   | 18,310                                            | 29,158      | 80,088      | 97,427      | 144,023     | 196,281     | 185,204     | 155,182     | 115,860     | 110,196     |             |
| Treasure                  | 2,849                                             | 3,518       | 4,396       | 4,153       | 4,052       | 4,014       | 3,929       | 4,043       | 4,000       | 4,209       |             |
| Missoula Region           | 541,230                                           | 524,809     | 915,313     | 466,852     | 800,522     | 762,281     | 812,554     | 848,526     | 848,196     | 848,657     | 853,000     |
| Mineral                   | 11,935                                            | 19,343      | 28,389      | 23,153      | 23,399      | 18,703      | 24,721      | 25,583      | 25,099      | 21,769      |             |
| Missoula                  | 287,710                                           | 441,095     | 782,001     | 743,831     | 681,518     | 652,876     | 690,229     | 720,383     | 719,968     | 719,161     |             |
| Ravalli                   | 41,585                                            | 64,172      | 106,923     | 99,047      | 95,066      | 90,702      | 97,604      | 102,561     | 105,149     | 107,727     |             |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data). Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.12

PROPERTY INCOME IN MONTANA BY REGION AND COUNTY<sup>a</sup>  
(Thousands of 1987 dollars)

| REGION                    | 1959      | 1969      | 1979        | 1980        | 1981        | 1982        | 1983        | 1984        | 1985        | 1986        | 1987<br>Estimate |
|---------------------------|-----------|-----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------------|
| Montana                   | \$688,209 | \$895,387 | \$1,585,002 | \$1,644,646 | \$1,844,273 | \$1,938,987 | \$1,942,005 | \$2,018,399 | \$2,017,157 | \$2,017,079 | \$1,990,000      |
| Billings Region           | 127,843   | 156,976   | 205,761     | 297,006     | 344,478     | 360,529     | 360,572     | 380,182     | 381,480     | 383,947     | 387,000          |
| Big Horn                  | 6,856     | 8,164     | 12,720      | 13,373      | 15,339      | 15,351      | 14,029      | 15,508      | 15,435      | 15,417      |                  |
| Carbon                    | 6,996     | 10,784    | 20,984      | 22,727      | 25,756      | 26,754      | 26,249      | 27,593      | 27,354      | 27,255      |                  |
| Stillwater                | 7,481     | 9,505     | 14,782      | 15,754      | 17,694      | 19,275      | 20,804      | 22,100      | 21,091      | 21,000      |                  |
| Sweet Grass               | 4,014     | 5,768     | 11,320      | 11,663      | 13,033      | 13,195      | 14,366      | 14,439      | 14,219      | 14,166      |                  |
| Yellowstone               | 102,696   | 122,756   | 225,954     | 233,489     | 272,657     | 285,956     | 285,145     | 300,541     | 303,380     | 306,150     |                  |
| Bozeman Region            | 53,435    | 63,568    | 122,836     | 128,053     | 145,942     | 149,492     | 156,806     | 160,926     | 165,089     | 165,261     | 167,000          |
| Gallatin                  | 33,501    | 42,958    | 85,909      | 90,625      | 104,797     | 105,007     | 112,424     | 116,410     | 116,692     | 116,979     |                  |
| Meagher                   | 3,970     | 3,378     | 4,800       | 5,084       | 5,686       | 6,749       | 6,589       | 8,444       | 8,534       | 8,507       |                  |
| Park                      | 15,964    | 17,234    | 32,127      | 32,344      | 35,458      | 37,736      | 37,792      | 38,072      | 41,862      | 41,775      |                  |
| Butte Region              | 86,732    | 95,854    | 134,713     | 139,080     | 155,277     | 166,407     | 161,394     | 166,027     | 161,947     | 160,289     | 154,000          |
| Beaverhead                | 12,438    | 12,752    | 21,269      | 21,053      | 22,364      | 23,753      | 24,171      | 23,333      | 22,468      | 22,405      |                  |
| Deer Lodge                | 11,025    | 12,518    | 14,591      | 15,833      | 18,178      | 19,372      | 19,145      | 20,935      | 19,489      | 19,519      |                  |
| Granite                   | 2,212     | 2,856     | 5,859       | 5,867       | 6,513       | 7,114       | 7,245       | 6,832       | 7,033       | 7,025       |                  |
| Madison                   | 6,278     | 7,645     | 17,916      | 17,715      | 19,019      | 18,043      | 18,119      | 18,417      | 18,465      | 18,391      |                  |
| Powell                    | 6,663     | 7,220     | 12,868      | 14,329      | 16,479      | 17,060      | 16,566      | 16,349      | 16,071      | 16,022      |                  |
| Silver Bow                | 48,116    | 52,883    | 62,210      | 64,302      | 72,724      | 81,065      | 76,148      | 80,161      | 78,420      | 78,926      |                  |
| Glasgow-Wolf Point Region | 30,386    | 46,811    | 82,710      | 87,045      | 96,290      | 102,285     | 107,356     | 108,936     | 107,194     | 106,575     | 106,000          |
| Daniels                   | 3,378     | 5,821     | 9,725       | 10,243      | 11,227      | 11,209      | 11,475      | 11,950      | 11,707      | 11,596      |                  |
| Phillips                  | 5,172     | 7,523     | 13,973      | 14,650      | 15,980      | 16,401      | 16,918      | 16,763      | 16,009      | 15,901      |                  |
| Roosevelt                 | 7,118     | 11,728    | 18,194      | 19,341      | 21,789      | 22,894      | 26,180      | 25,643      | 25,937      | 25,823      |                  |
| Sheridan                  | 6,230     | 9,423     | 16,938      | 18,051      | 20,350      | 22,081      | 24,821      | 26,038      | 25,899      | 25,767      |                  |
| Valley                    | 8,287     | 12,116    | 23,880      | 26,760      | 26,943      | 29,699      | 27,980      | 28,542      | 27,642      | 27,488      |                  |
| Glendive-Sidney Region    | 22,013    | 34,524    | 65,664      | 68,755      | 77,139      | 85,777      | 84,961      | 86,270      | 84,366      | 84,155      | 83,000           |
| Dawson                    | 7,951     | 12,466    | 22,818      | 23,843      | 26,765      | 30,247      | 27,955      | 28,259      | 27,290      | 27,273      |                  |
| Garfield                  | 1,365     | 2,256     | 4,169       | 4,239       | 4,892       | 5,264       | 5,158       | 5,176       | 5,254       | 5,220       |                  |
| McCone                    | 2,172     | 3,340     | 7,948       | 7,490       | 7,764       | 7,828       | 7,690       | 7,881       | 7,547       | 7,499       |                  |
| Prairie                   | 1,491     | 2,238     | 4,227       | 4,786       | 5,439       | 5,667       | 5,825       | 5,847       | 5,697       | 5,632       |                  |
| Richland                  | 7,140     | 12,055    | 23,399      | 25,015      | 28,611      | 30,896      | 33,977      | 34,535      | 34,538      | 34,507      |                  |
| Wibaux                    | 1,894     | 2,189     | 3,104       | 3,582       | 3,869       | 3,875       | 4,358       | 4,375       | 4,040       | 4,024       |                  |
| Great Falls Region        | 115,787   | 158,288   | 227,134     | 236,653     | 267,019     | 280,665     | 282,755     | 295,176     | 294,313     | 294,066     | 289,000          |
| Cascade                   | 76,495    | 102,992   | 159,621     | 145,199     | 164,621     | 172,709     | 172,525     | 183,818     | 186,210     | 186,467     |                  |
| Chouteau                  | 10,392    | 13,926    | 23,264      | 23,894      | 28,605      | 26,985      | 27,371      | 26,564      | 25,845      | 25,713      |                  |
| Glacier                   | 8,156     | 8,703     | 14,355      | 14,163      | 15,468      | 18,294      | 18,615      | 19,376      | 19,661      | 19,666      |                  |
| Pondera                   | 6,102     | 12,241    | 17,890      | 18,996      | 21,480      | 22,057      | 22,416      | 23,671      | 21,841      | 21,739      |                  |
| Teton                     | 8,039     | 11,804    | 18,825      | 19,815      | 22,119      | 22,694      | 23,825      | 23,397      | 23,305      | 23,151      |                  |
| Toole                     | 6,582     | 8,621     | 13,379      | 14,605      | 16,727      | 17,945      | 17,982      | 18,349      | 17,452      | 17,330      |                  |
| Havre Region              | 29,472    | 38,641    | 58,633      | 61,783      | 70,297      | 72,975      | 72,116      | 75,257      | 74,647      | 73,802      | 72,000           |
| Blaine                    | 5,487     | 7,741     | 13,577      | 13,952      | 15,284      | 16,382      | 16,277      | 16,554      | 16,302      | 16,244      |                  |
| Hill                      | 19,749    | 25,656    | 36,992      | 39,194      | 45,280      | 46,744      | 46,319      | 49,193      | 48,361      | 47,645      |                  |
| Liberty                   | 4,256     | 5,243     | 8,064       | 8,637       | 9,733       | 9,849       | 9,520       | 9,510       | 9,984       | 9,913       |                  |
| Helena Region             | 42,343    | 56,326    | 96,913      | 100,443     | 113,768     | 122,747     | 118,396     | 124,280     | 124,900     | 125,259     | 125,000          |
| Broadwater                | 2,305     | 3,396     | 7,457       | 7,474       | 8,124       | 8,406       | 7,988       | 8,201       | 9,085       | 9,052       |                  |
| Jefferson                 | 2,704     | 3,865     | 11,051      | 11,212      | 12,395      | 13,122      | 14,315      | 16,141      | 16,776      | 16,807      |                  |
| Lewis & Clark             | 37,334    | 47,066    | 78,404      | 81,758      | 93,249      | 101,260     | 96,092      | 99,938      | 99,039      | 99,399      |                  |
| Kalispell Region          | 63,920    | 84,256    | 182,719     | 189,068     | 210,559     | 218,485     | 225,239     | 232,625     | 233,912     | 234,115     | 233,000          |
| Flathead                  | 37,457    | 47,086    | 108,855     | 112,705     | 125,675     | 128,773     | 133,537     | 139,161     | 139,241     | 139,285     |                  |
| Lake                      | 13,286    | 18,234    | 41,405      | 43,292      | 48,466      | 51,319      | 54,107      | 55,460      | 55,073      | 54,945      |                  |
| Lincoln                   | 7,225     | 11,743    | 18,996      | 18,902      | 20,528      | 21,992      | 21,822      | 21,856      | 22,559      | 22,809      |                  |
| Sanders                   | 5,971     | 7,193     | 13,463      | 16,169      | 15,890      | 16,401      | 15,773      | 16,151      | 17,038      | 17,077      |                  |
| Livingston Region         | 27,337    | 36,418    | 68,219      | 70,240      | 77,539      | 79,556      | 82,194      | 84,210      | 83,791      | 83,387      | 81,000           |
| Fergus                    | 15,184    | 20,904    | 37,838      | 39,151      | 45,194      | 45,907      | 44,986      | 46,052      | 45,036      | 44,803      |                  |
| Golden Valley             | 1,043     | 1,623     | 3,561       | 3,348       | 3,431       | 3,682       | 3,824       | 4,170       | 3,988       | 3,961       |                  |
| Judith Basin              | 3,600     | 4,270     | 7,152       | 7,265       | 7,694       | 7,864       | 8,802       | 9,420       | 9,868       | 9,821       |                  |
| Musselshell               | 4,458     | 5,637     | 11,846      | 12,251      | 13,593      | 14,457      | 14,860      | 14,093      | 14,314      | 14,265      |                  |
| Petroleum                 | 233       | 402       | 941         | 1,132       | 1,353       | 1,134       | 1,239       | 1,239       | 1,276       | 1,267       |                  |
| Wheatland                 | 2,819     | 3,582     | 6,881       | 7,094       | 8,073       | 8,514       | 8,483       | 9,236       | 9,311       | 9,269       |                  |
| Miles City Region         | 23,438    | 35,710    | 68,103      | 71,438      | 79,206      | 85,189      | 80,452      | 80,771      | 78,785      | 78,600      | 75,000           |
| Carter                    | 1,317     | 2,542     | 4,879       | 5,062       | 5,505       | 5,499       | 5,853       | 6,065       | 6,817       | 6,765       |                  |
| Custer                    | 13,297    | 18,674    | 34,791      | 35,708      | 38,993      | 41,046      | 39,611      | 38,621      | 37,129      | 36,958      |                  |
| Fallon                    | 2,009     | 3,847     | 6,921       | 7,755       | 9,105       | 9,380       | 9,346       | 9,267       | 9,201       | 9,183       |                  |
| Powder River              | 1,620     | 3,081     | 6,101       | 6,436       | 6,778       | 6,915       | 6,642       | 6,643       | 6,503       | 6,557       |                  |
| Rosebud                   | 4,199     | 6,214     | 12,228      | 13,361      | 15,457      | 16,752      | 15,184      | 16,090      | 15,672      | 15,783      |                  |
| Treasure                  | 995       | 1,352     | 3,102       | 3,137       | 3,368       | 3,597       | 3,615       | 3,285       | 3,384       | 3,354       |                  |
| Missoula Region           | 65,525    | 90,415    | 191,599     | 195,083     | 206,760     | 210,837     | 209,787     | 223,738     | 228,752     | 227,625     | 221,000          |
| Mineral                   | 1,417     | 2,049     | 3,727       | 3,676       | 3,980       | 4,206       | 3,071       | 4,003       | 4,589       | 4,673       |                  |
| Missoula                  | 48,473    | 67,435    | 132,506     | 134,861     | 140,702     | 150,727     | 161,103     | 152,702     | 154,556     | 155,567     |                  |
| Bannock                   | 15,635    | 20,933    | 55,366      | 56,546      | 62,078      | 63,904      | 64,014      | 67,033      | 67,588      | 67,382      |                  |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.13

| REGION                    | TRANSFER PAYMENTS IN MONTANA BY REGION AND COUNTY* |           |             |             |             |             |             |             |             |             |             |
|---------------------------|----------------------------------------------------|-----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                           | 1959                                               | 1960      | 1970        | 1980        | 1981        | 1982        | 1983        | 1984        | 1985        | 1986        | Estimate    |
| Montana                   | \$430,048                                          | \$668,349 | \$1,360,824 | \$1,449,040 | \$1,521,385 | \$1,610,453 | \$1,685,185 | \$1,706,221 | \$1,767,320 | \$1,827,710 | \$1,836,000 |
| Billings Region           | 62,473                                             | 101,549   | 210,682     | 226,900     | 237,997     | 252,701     | 267,812     | 274,627     | 284,557     | 294,642     | 296,000     |
| Big Horn                  | 5,076                                              | 7,794     | 15,420      | 16,591      | 17,733      | 18,113      | 18,645      | 19,551      | 20,542      | 21,455      |             |
| Carbon                    | 6,745                                              | 8,971     | 16,825      | 18,015      | 18,563      | 18,778      | 19,798      | 19,981      | 20,367      | 20,986      |             |
| Stillwater                | 3,230                                              | 5,586     | 10,758      | 11,256      | 12,011      | 12,675      | 15,864      | 13,994      | 14,441      | 14,991      |             |
| Sweet Grass               | 2,035                                              | 3,090     | 5,393       | 5,866       | 6,358       | 6,551       | 6,723       | 6,986       | 7,323       | 7,455       |             |
| Yellowstone               | 45,588                                             | 76,308    | 162,286     | 175,174     | 185,553     | 196,383     | 208,761     | 214,114     | 221,664     | 229,779     |             |
| Bozeman Region            | 25,424                                             | 39,100    | 64,642      | 91,480      | 96,711      | 105,796     | 112,488     | 113,095     | 119,087     | 124,239     | 125,000     |
| Gallatin                  | 15,209                                             | 25,424    | 59,791      | 65,361      | 67,944      | 71,478      | 76,559      | 76,904      | 81,156      | 84,813      |             |
| Meagher                   | 1,698                                              | 2,081     | 5,530       | 5,655       | 4,295       | 4,920       | 5,317       | 4,784       | 4,646       | 4,835       |             |
| Park                      | 8,517                                              | 11,594    | 21,120      | 22,483      | 26,468      | 29,398      | 30,653      | 31,406      | 33,284      | 34,591      |             |
| Butte Region              | 66,585                                             | 92,015    | 162,416     | 169,271     | 178,138     | 186,608     | 194,645     | 193,725     | 196,775     | 204,054     | 205,000     |
| Beaverhead                | 5,059                                              | 7,604     | 14,204      | 14,897      | 15,150      | 16,226      | 17,344      | 17,463      | 18,798      | 19,933      |             |
| Deer Lodge                | 11,125                                             | 16,534    | 26,645      | 30,404      | 32,765      | 32,711      | 34,514      | 34,166      | 34,705      | 35,587      |             |
| Granite                   | 1,913                                              | 2,976     | 5,157       | 5,456       | 5,938       | 6,318       | 6,482       | 6,435       | 6,715       | 6,866       |             |
| Madison                   | 3,382                                              | 5,036     | 9,685       | 9,589       | 10,669      | 10,837      | 11,656      | 12,134      | 12,399      | 12,790      |             |
| Powell                    | 5,875                                              | 7,476     | 13,458      | 14,151      | 14,685      | 15,071      | 16,159      | 16,005      | 16,555      | 16,772      |             |
| Silver Bow                | 39,250                                             | 52,589    | 91,268      | 96,773      | 98,931      | 102,927     | 108,491     | 107,520     | 107,605     | 112,125     |             |
| Glasgow-Wolf Point Region | 25,561                                             | 38,225    | 59,160      | 62,415      | 65,912      | 69,207      | 72,668      | 72,432      | 74,256      | 74,428      | 77,000      |
| Daniels                   | 2,164                                              | 4,255     | 5,645       | 5,866       | 6,352       | 6,562       | 6,628       | 6,330       | 6,382       | 6,482       |             |
| Phillips                  | 3,860                                              | 5,957     | 8,830       | 9,114       | 9,814       | 10,900      | 11,027      | 11,640      | 11,971      | 12,302      |             |
| Roosevelt                 | 6,895                                              | 11,198    | 17,062      | 18,080      | 19,129      | 20,283      | 21,412      | 21,667      | 22,235      | 22,976      |             |
| Sheridan                  | 6,192                                              | 5,220     | 8,013       | 9,430       | 9,803       | 10,700      | 11,518      | 11,497      | 11,715      | 12,055      |             |
| Valley                    | 8,472                                              | 11,615    | 18,811      | 19,904      | 20,854      | 20,765      | 21,862      | 21,298      | 21,954      | 22,655      |             |
| Claudine-Sidney Region    | 15,727                                             | 25,512    | 44,954      | 47,960      | 49,052      | 54,668      | 59,985      | 59,107      | 59,538      | 61,514      | 62,000      |
| Dawson                    | 5,376                                              | 9,924     | 17,795      | 18,656      | 18,466      | 20,714      | 22,922      | 22,771      | 21,704      | 22,545      |             |
| Garfield                  | 918                                                | 1,519     | 2,439       | 2,437       | 2,643       | 2,715       | 2,975       | 2,986       | 3,374       | 3,507       |             |
| McCone                    | 1,324                                              | 1,921     | 3,204       | 3,225       | 3,804       | 4,211       | 4,647       | 4,394       | 4,482       | 4,617       |             |
| Prairie                   | 1,188                                              | 2,180     | 3,209       | 3,599       | 3,989       | 3,899       | 4,017       | 4,148       | 4,153       | 4,297       |             |
| Richland                  | 5,934                                              | 8,355     | 15,838      | 16,680      | 17,520      | 20,002      | 22,162      | 21,532      | 22,620      | 23,439      |             |
| Wibaux                    | 988                                                | 1,615     | 2,473       | 2,963       | 2,653       | 2,927       | 3,260       | 3,273       | 3,205       | 3,511       |             |
| Great Falls Region        | 83,879                                             | 116,968   | 214,845     | 223,469     | 235,252     | 244,253     | 256,663     | 260,373     | 270,477     | 278,985     | 280,000     |
| Cascade                   | 41,499                                             | 78,955    | 153,371     | 159,564     | 165,597     | 172,629     | 182,192     | 183,507     | 190,455     | 190,645     |             |
| Chouteau                  | 3,899                                              | 6,301     | 9,745       | 10,625      | 11,115      | 12,078      | 12,112      | 12,212      | 12,296      | 12,635      |             |
| Glacier                   | 8,345                                              | 12,399    | 20,706      | 21,360      | 22,104      | 22,656      | 24,412      | 25,604      | 28,573      | 27,266      |             |
| Pondera                   | 3,829                                              | 5,966     | 11,035      | 11,077      | 12,185      | 13,140      | 13,276      | 13,795      | 14,366      | 14,884      |             |
| Teton                     | 3,862                                              | 5,786     | 10,802      | 11,264      | 12,355      | 12,939      | 13,249      | 13,606      | 14,237      | 14,386      |             |
| Toole                     | 4,244                                              | 5,561     | 8,987       | 9,359       | 9,918       | 10,811      | 11,422      | 11,852      | 12,353      | 12,971      |             |
| Helena Region             | 15,590                                             | 25,780    | 46,897      | 49,100      | 50,772      | 55,090      | 57,018      | 57,482      | 58,826      | 61,008      | 61,000      |
| Blaine                    | 5,194                                              | 7,686     | 12,806      | 13,411      | 13,544      | 14,279      | 14,509      | 15,211      | 15,742      | 16,265      |             |
| Hill                      | 9,364                                              | 16,404    | 30,477      | 32,011      | 33,598      | 36,641      | 37,921      | 37,611      | 38,480      | 39,975      |             |
| Liberty                   | 1,052                                              | 1,690     | 5,616       | 5,677       | 5,430       | 4,169       | 4,566       | 4,660       | 4,606       | 4,750       |             |
| Helene Region             | 24,596                                             | 46,613    | 100,571     | 106,707     | 113,003     | 119,740     | 124,257     | 126,052     | 133,266     | 138,024     | 139,000     |
| Broadwater                | 1,543                                              | 2,527     | 4,728       | 5,293       | 6,076       | 6,673       | 6,734       | 6,969       | 7,604       | 7,977       |             |
| Jefferson                 | 2,864                                              | 5,612     | 11,903      | 12,661      | 13,865      | 14,681      | 14,958      | 15,650      | 15,817      | 16,394      |             |
| Lewis & Clark             | 20,189                                             | 38,473    | 85,940      | 88,755      | 95,062      | 98,587      | 102,566     | 103,633     | 109,846     | 113,653     |             |
| Kalispell Region          | 52,081                                             | 76,871    | 171,215     | 184,376     | 193,667     | 212,732     | 218,166     | 221,812     | 231,966     | 238,561     | 240,000     |
| Flathead                  | 29,002                                             | 40,747    | 90,760      | 97,245      | 102,075     | 111,215     | 115,203     | 115,621     | 120,501     | 123,954     |             |
| Lake                      | 9,436                                              | 16,243    | 35,974      | 38,320      | 40,995      | 44,111      | 46,008      | 48,023      | 50,416      | 52,054      |             |
| Lincoln                   | 7,658                                              | 11,670    | 27,580      | 31,084      | 31,863      | 35,971      | 35,056      | 35,988      | 37,592      | 38,566      |             |
| Sanders                   | 5,966                                              | 8,211     | 16,901      | 17,728      | 18,735      | 21,435      | 21,921      | 22,580      | 23,457      | 24,020      |             |
| Lewistown Region          | 17,973                                             | 27,080    | 48,005      | 51,029      | 52,690      | 55,787      | 54,514      | 54,966      | 55,626      | 56,880      | 57,000      |
| Fergus                    | 9,434                                              | 14,862    | 26,227      | 27,987      | 28,791      | 29,040      | 29,356      | 29,846      | 30,202      | 31,111      |             |
| Golden Valley             | 718                                                | 1,061     | 1,597       | 1,707       | 1,805       | 1,929       | 2,050       | 2,145       | 2,191       | 2,232       |             |
| Judith Basin              | 1,630                                              | 2,542     | 4,280       | 4,679       | 4,920       | 5,043       | 4,994       | 5,017       | 5,277       | 5,285       |             |
| Musselshell               | 3,665                                              | 5,010     | 10,205      | 10,531      | 10,663      | 11,045      | 11,415      | 11,393      | 11,283      | 11,551      |             |
| Petroleum                 | 459                                                | 593       | 628         | 451         | 700         | 690         | 759         | 678         | 750         | 787         |             |
| Wheatland                 | 2,027                                              | 3,212     | 5,067       | 5,473       | 5,813       | 6,041       | 5,959       | 5,891       | 5,925       | 5,916       |             |
| Miles City Region         | 18,049                                             | 27,175    | 47,866      | 51,090      | 55,562      | 56,046      | 60,161      | 62,295      | 62,898      | 66,653      | 65,000      |
| Carter                    | 1,206                                              | 1,860     | 2,560       | 2,712       | 2,866       | 2,922       | 3,165       | 3,022       | 3,168       | 3,268       |             |
| Custer                    | 7,710                                              | 13,448    | 23,454      | 24,841      | 25,902      | 26,810      | 24,643      | 29,469      | 30,342      | 31,452      |             |
| Fallon                    | 1,765                                              | 2,950     | 5,341       | 5,758       | 5,490       | 6,029       | 4,158       | 6,123       | 6,245       | 6,578       |             |
| Powder River              | 895                                                | 1,667     | 2,897       | 2,965       | 3,084       | 3,272       | 3,560       | 3,707       | 3,720       | 3,862       |             |
| Rosebud                   | 3,857                                              | 8,447     | 12,076      | 15,302      | 14,249      | 15,614      | 16,910      | 18,208      | 17,568      | 17,611      |             |
| Treasure                  | 636                                                | 781       | 1,359       | 1,492       | 1,550       | 1,599       | 1,725       | 1,765       | 1,857       | 1,862       |             |
| Missoula Region           | 44,311                                             | 75,664    | 169,970     | 185,246     | 196,628     | 201,945     | 206,412     | 210,259     | 220,269     | 228,702     | 230,000     |
| Mineral                   | 1,990                                              | 3,081     | 6,562       | 7,260       | 7,433       | 9,131       | 8,566       | 8,122       | 8,542       | 8,649       |             |
| Missoula                  | 32,639                                             | 53,268    | 122,200     | 132,555     | 137,741     | 141,014     | 146,701     | 145,918     | 152,887     | 159,629     |             |
| Ravalli                   | 9,882                                              | 17,516    | 41,408      | 45,431      | 49,455      | 51,801      | 55,745      | 56,219      | 58,840      | 60,423      |             |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.14

|                           | FARM EARNINGS IN MONTANA BY REGION AND COUNTY* |          |           |           |           |           |           |          |          |           | 1987      |
|---------------------------|------------------------------------------------|----------|-----------|-----------|-----------|-----------|-----------|----------|----------|-----------|-----------|
|                           | (Thousands of 1987 dollars)                    |          |           |           |           |           |           |          |          |           | Estimate  |
|                           | 1959                                           | 1969     | 1979      | 1980      | 1981      | 1982      | 1983      | 1984     | 1985     | 1986      |           |
| Montana                   | \$334,960                                      | 1722,112 | \$377,285 | \$386,656 | \$438,717 | \$223,369 | \$133,897 | \$77,928 | \$16,838 | \$438,410 | \$422,000 |
| Billings Region           | 66,180                                         | 100,902  | 66,820    | 50,629    | 37,304    | 20,345    | 15,247    | 16,297   | 10,071   | 49,338    | 53,000    |
| Big Horn                  | 14,899                                         | 27,373   | 17,690    | 19,000    | 17,086    | 8,090     | 5,191     | 4,317    | 1,031    | 16,662    |           |
| Carbon                    | 12,438                                         | 16,065   | 6,479     | 8,147     | 6,751     | 3,302     | 569       | 868      | 1,390    | 6,915     |           |
| Stillwater                | 10,385                                         | 14,328   | 6,083     | 6,623     | 5,041     | 2,678     | 2,126     | 2,800    | 1,247    | 6,715     |           |
| Sweet Grass               | 4,847                                          | 8,339    | 8,487     | 7,250     | 3,756     | 2,024     | 2,508     | 2,393    | 1,854    | 6,419     |           |
| Yellowstone               | 23,412                                         | 34,373   | 8,081     | 9,607     | 2,669     | 3,451     | 4,833     | 5,919    | 4,349    | 14,626    |           |
| Bozeman Region            | 32,916                                         | 29,487   | 29,922    | 29,856    | 25,717    | 10,827    | 12,019    | 13,821   | 12,754   | 31,348    | 33,000    |
| Gallatin                  | 18,010                                         | 12,617   | 12,897    | 19,005    | 15,146    | 6,947     | 8,860     | 12,642   | 12,258   | 20,939    |           |
| Hearder                   | 4,046                                          | 5,445    | 7,978     | 5,314     | 5,697     | 3,125     | 1,821     | 1,503    | (391)    | 5,377     |           |
| Park                      | 10,862                                         | 11,425   | 9,047     | 5,536     | 4,873     | 753       | 1,338     | 1,676    | 887      | 5,232     |           |
| Bullock Region            | 37,308                                         | 31,872   | 40,552    | 26,338    | 26,803    | 10,646    | 6,140     | 7,876    | 6,978    | 25,652    | 25,000    |
| Beaverhead                | 11,924                                         | 13,969   | 15,581    | 9,169     | 13,799    | 8,946     | 4,550     | 4,229    | 2,808    | 9,650     |           |
| Deer Lodge                | 1,273                                          | 2,078    | 1,927     | 1,780     | 870       | 629       | 526       | 780      | 361      | 1,449     |           |
| Granite                   | 5,453                                          | 2,783    | 5,309     | 3,809     | 2,943     | 1,040     | 657       | 857      | 957      | 3,008     |           |
| Madison                   | 9,101                                          | 8,960    | 11,771    | 7,866     | 6,626     | 1,464     | 1,030     | 2,289    | 2,936    | 7,805     |           |
| Powell                    | 8,813                                          | 3,329    | 5,298     | 3,026     | 2,739     | (926)     | (1,116)   | (831)    | (1,023)  | 3,089     |           |
| Silver Bow                | 766                                            | 772      | 666       | 700       | (195)     | (505)     | 473       | 552      | 739      | 671       |           |
| Glasgow-Wolf Point Region | 38,821                                         | 91,383   | 20,425    | 27,180    | 55,436    | 23,467    | (8,964)   | (17,138) | (24,341) | 65,628    | 38,000    |
| Daniels                   | 5,213                                          | 15,109   | 5,130     | 8,938     | 10,139    | 8,807     | 812       | (1,307)  | (1,695)  | 11,231    |           |
| Phillips                  | 11,610                                         | 12,606   | 4,494     | 4,467     | 9,441     | 1,114     | (4,270)   | (5,683)  | (6,626)  | 5,606     |           |
| Roosevelt                 | 5,302                                          | 18,266   | 816       | 6,814     | 6,689     | 2,296     | (4,074)   | (5,312)  | (6,810)  | 4,679     |           |
| Sheridan                  | 8,672                                          | 21,670   | 3,646     | 1,206     | 11,803    | 10,169    | 2,401     | 368      | (1,168)  | 12,210    |           |
| Valley                    | 6,025                                          | 23,734   | 6,339     | 7,755     | 14,363    | 3,081     | (3,033)   | (3,204)  | (8,042)  | 9,898     |           |
| Glendive-Sidney Region    | 27,814                                         | 72,569   | 26,152    | 31,956    | 50,613    | 26,322    | 10,147    | 8,734    | 4,492    | 45,861    | 42,000    |
| Dawson                    | 3,581                                          | 14,436   | 3,345     | 6,272     | 9,411     | 4,552     | 1,893     | 1,174    | 661      | 7,540     |           |
| Garfield                  | 4,617                                          | 16,112   | 9,010     | 7,860     | 12,462    | 6,666     | 3,968     | 2,128    | 420      | 9,281     |           |
| McCone                    | 1,332                                          | 13,090   | 6,967     | 10,600    | 13,406    | 8,925     | 3,373     | 6,044    | 1,897    | 10,832    |           |
| Prairie                   | 4,869                                          | 5,316    | 4,409     | 2,850     | 4,625     | 1,324     | 398       | 1,309    | 419      | 3,678     |           |
| Richland                  | 11,099                                         | 18,688   | 801       | 3,113     | 8,537     | 4,303     | 999       | (L)      | 1,954    | 12,742    |           |
| Wibaux                    | 2,316                                          | 5,127    | 1,641     | 1,661     | 2,372     | 332       | (487)     | (L)      | (859)    | 1,787     |           |
| Great Falls Region        | 109,130                                        | 167,380  | 50,176    | 86,070    | 91,771    | 63,603    | 48,007    | 13,798   | (7,185)  | 86,203    | 81,000    |
| Cascade                   | 19,978                                         | 29,954   | 13,975    | 15,743    | 9,246     | 7,022     | 9,349     | 11,669   | 1,363    | 16,805    |           |
| Chouteau                  | 36,400                                         | 40,977   | 7,037     | 7,602     | 28,747    | 18,856    | 13,174    | 3,723    | 2,437    | 24,410    |           |
| Glacier                   | 5,172                                          | 9,009    | 5,827     | 13,013    | 13,574    | 13,980    | 8,575     | 236      | (1,075)  | 12,284    |           |
| Pondera                   | 14,377                                         | 26,820   | 3,275     | 8,471     | 13,566    | 8,507     | 3,396     | (4,100)  | (9,564)  | 8,506     |           |
| Teton                     | 20,925                                         | 22,699   | 8,122     | 10,621    | 14,893    | 8,425     | 8,337     | 1,805    | 211      | 15,768    |           |
| Toole                     | 14,077                                         | 18,120   | 9,942     | 10,617    | 11,747    | 8,816     | 6,976     | 467      | (757)    | 8,649     |           |
| Havre Region              | 64,981                                         | 56,686   | 17,297    | 23,596    | 51,595    | 26,615    | 23,800    | (608)    | (8,573)  | 46,182    | 44,000    |
| Blaine                    | 15,166                                         | 12,693   | 8,189     | 8,189     | 12,844    | 4,378     | 1,912     | (1,209)  | (4,523)  | 9,107     |           |
| Hill                      | 33,382                                         | 27,100   | 3,875     | 9,469     | 25,307    | 12,732    | 11,154    | (700)    | (5,054)  | 20,423    |           |
| Liberty                   | 16,416                                         | 14,891   | 5,232     | 7,939     | 13,443    | 9,305     | 10,733    | 1,301    | 1,004    | 14,652    |           |
| Helena Region             | 18,602                                         | 17,797   | 13,180    | 13,564    | 7,637     | 2,643     | 2,967     | 2,953    | 786      | 11,992    | 11,000    |
| Broadwater                | 6,389                                          | 4,273    | 3,266     | 3,726     | 1,897     | 0         | 859       | 91       | (1,820)  | 5,401     |           |
| Jefferson                 | 3,123                                          | 2,813    | 6,624     | 3,938     | 2,371     | 517       | 273       | 476      | 50       | 2,537     |           |
| Lewis & Clark             | 8,890                                          | 10,711   | 5,290     | 3,880     | 3,569     | 2,126     | 1,856     | 2,388    | 2,556    | 4,053     |           |
| Kalispell Region          | 28,551                                         | 24,075   | 24,623    | 29,086    | 14,555    | 7,152     | 4,656     | 7,396    | 7,728    | 22,989    | 22,000    |
| Flathead                  | 11,151                                         | 9,108    | 5,821     | 9,432     | 5,909     | 6,764     | 4,897     | 3,502    | 7,141    | 10,472    |           |
| Lolo                      | 11,902                                         | 10,289   | 12,170    | 13,725    | 4,336     | (955)     | (2,796)   | (1,269)  | (2,189)  | 7,517     |           |
| Lincoln                   | 1,891                                          | 1,323    | 1,413     | 1,149     | 777       | 773       | 522       | 787      | 685      | 1,230     |           |
| Sanders                   | 3,607                                          | 3,353    | 5,217     | 4,780     | 3,516     | 2,569     | 2,033     | 2,355    | 2,090    | 3,771     |           |
| Lewistown Region          | 50,597                                         | 67,736   | 37,642    | 29,263    | 33,641    | 13,199    | 6,341     | 2,927    | (5,949)  | 28,962    | 24,000    |
| Fergus                    | 22,864                                         | 50,277   | 19,326    | 14,704    | 15,716    | 5,325     | 1,848     | (1,138)  | (6,178)  | 8,050     |           |
| Golden Valley             | 3,829                                          | 4,205    | 2,057     | 2,095     | 2,818     | 1,399     | 412       | 490      | 364      | 3,325     |           |
| Judith Basin              | 13,241                                         | 19,360   | 3,069     | 4,307     | 3,756     | 1,154     | 1,841     | 1,755    | (886)    | 6,510     |           |
| Musselshell               | 3,652                                          | 7,103    | 1,985     | 2,378     | 3,270     | 1,366     | 495       | 402      | (199)    | 3,943     |           |
| Petroleum                 | 2,560                                          | 2,950    | 2,708     | 1,223     | 2,696     | 1,024     | 76        | (169)    | 188      | 2,732     |           |
| Wheatland                 | 4,451                                          | 7,843    | 6,317     | 4,359     | 3,386     | 2,731     | 1,869     | 1,386    | 761      | 3,623     |           |
| Miles City Region         | 40,967                                         | 75,180   | 39,766    | 48,965    | 38,386    | 12,641    | 10,070    | 14,894   | 14,623   | 35,238    | 35,000    |
| Carter                    | 6,423                                          | 15,349   | 9,945     | 7,105     | 4,338     | (940)     | (1,620)   | 140      | (842)    | 5,417     |           |
| Custer                    | 7,681                                          | 17,199   | 11,409    | 12,935    | 9,707     | 5,259     | 3,129     | 8,043    | 9,906    | 10,898    |           |
| Fallon                    | 3,851                                          | 9,758    | 4,723     | 5,441     | 5,095     | 2,370     | 1,607     | 2,198    | 1,170    | 5,575     |           |
| Powder River              | 9,123                                          | 13,763   | 13,261    | 7,665     | 7,610     | 2,138     | 1,731     | 1,420    | 861      | 6,693     |           |
| Rosebud                   | 10,019                                         | 12,696   | 15,093    | 9,370     | 8,236     | 2,072     | 1,343     | 1,426    | 1,663    | 4,513     |           |
| Treasure                  | 3,870                                          | 8,415    | 5,332     | 6,029     | 3,403     | 1,742     | 1,879     | 1,267    | 1,864    | 4,140     |           |
| Missoula Region           | 19,094                                         | 8,846    | 10,951    | 10,170    | 5,058     | 2,109     | 3,268     | 4,977    | 5,435    | 12,817    | 14,000    |
| Mineral                   | 906                                            | 122      | 599       | 465       | 388       | 378       | 601       | 496      | 636      | 729       |           |
| Missoula                  | 6,400                                          | 2,675    | 6,540     | 4,080     | 1,950     | 1,058     | 1,978     | 2,326    | 2,049    | 4,339     |           |
| Revelli                   | 11,787                                         | 6,249    | 5,611     | 5,625     | 2,720     | 676       | 809       | 2,157    | 2,771    | 7,729     |           |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

(L) Less than \$50,000 in current dollars

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.15

| REGION                    | PER CAPITA PERSONAL INCOME IN MONTANA BY REGION AND COUNTY* |          |          |          |          |          |          |          |          |          |                  |
|---------------------------|-------------------------------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------------|
|                           | 1959                                                        | 1969     | 1979     | 1980     | 1981     | 1982     | 1983     | 1984     | 1985     | 1986     | 1987<br>Estimate |
| Montana                   | \$17,275                                                    | \$19,350 | \$12,448 | \$12,314 | \$12,474 | \$12,050 | \$11,966 | \$11,978 | \$11,823 | \$12,385 | \$12,400         |
| Billings Region           | 7,951                                                       | 9,820    | 13,658   | 13,605   | 13,587   | 13,387   | 13,229   | 13,265   | 13,021   | 13,236   | 13,300           |
| Big Horn                  | 5,521                                                       | 7,744    | 10,787   | 11,406   | 11,499   | 10,196   | 9,729    | 9,856    | 9,607    | 11,130   |                  |
| Carbon                    | 5,853                                                       | 8,756    | 10,713   | 11,553   | 11,620   | 11,057   | 10,457   | 10,269   | 10,355   | 11,099   |                  |
| Stillwater                | 6,556                                                       | 9,834    | 11,504   | 12,434   | 12,517   | 11,995   | 12,054   | 12,148   | 11,500   | 12,237   |                  |
| Sweet Grass               | 5,695                                                       | 9,225    | 13,200   | 12,694   | 12,470   | 11,503   | 11,735   | 11,815   | 11,831   | 13,373   |                  |
| Yellowstone               | 8,896                                                       | 10,169   | 14,306   | 14,072   | 14,034   | 14,004   | 13,873   | 13,911   | 13,636   | 13,631   |                  |
| Bozeman Region            | 6,895                                                       | 7,920    | 11,623   | 11,318   | 11,669   | 11,254   | 11,458   | 11,752   | 11,702   | 11,840   | 11,900           |
| Gallatin                  | 6,964                                                       | 7,762    | 11,288   | 11,107   | 11,259   | 11,115   | 11,478   | 11,768   | 11,715   | 11,552   |                  |
| Reeber                    | 7,328                                                       | 8,528    | 11,742   | 11,016   | 11,377   | 10,517   | 9,818    | 9,531    | 8,936    | 11,819   |                  |
| Park                      | 8,673                                                       | 8,280    | 12,687   | 12,063   | 12,085   | 11,851   | 11,870   | 12,066   | 12,096   | 12,950   |                  |
| Butte Region              | 7,205                                                       | 8,317    | 11,771   | 11,466   | 11,978   | 11,692   | 11,462   | 11,561   | 11,524   | 12,199   | 12,300           |
| Beaverhead                | 7,812                                                       | 8,435    | 12,285   | 10,981   | 11,449   | 10,879   | 10,593   | 10,745   | 10,431   | 11,754   |                  |
| Deer Lodge                | 5,887                                                       | 7,435    | 10,685   | 9,956    | 9,853    | 9,461    | 9,729    | 9,990    | 9,951    | 10,827   |                  |
| Granite                   | 7,304                                                       | 7,281    | 11,705   | 11,067   | 10,982   | 10,319   | 10,960   | 10,775   | 10,269   | 10,909   |                  |
| Madison                   | 5,907                                                       | 7,814    | 11,981   | 10,977   | 10,968   | 9,712    | 9,605    | 9,968    | 10,338   | 11,557   |                  |
| Powell                    | 7,283                                                       | 8,001    | 10,543   | 10,538   | 10,555   | 10,729   | 10,704   | 10,828   | 10,781   | 11,109   |                  |
| Silver Bow                | 7,769                                                       | 8,802    | 12,225   | 12,367   | 13,270   | 13,184   | 13,101   | 12,728   | 12,897   | 13,152   |                  |
| Glasgow-Wolf Point Region | 5,273                                                       | 9,097    | 10,905   | 11,211   | 12,862   | 11,259   | 10,294   | 10,245   | 9,863    | 12,284   | 12,300           |
| Daniels                   | 5,518                                                       | 11,096   | 11,898   | 12,561   | 14,352   | 14,498   | 11,314   | 10,628   | 10,270   | 15,782   |                  |
| Phillips                  | 5,775                                                       | 7,957    | 10,532   | 10,573   | 11,670   | 9,920    | 8,964    | 9,206    | 8,402    | 11,278   |                  |
| Roosevelt                 | 4,345                                                       | 8,511    | 10,041   | 10,368   | 10,768   | 9,999    | 9,693    | 9,602    | 9,423    | 10,511   |                  |
| Sheridan                  | 5,733                                                       | 10,105   | 11,835   | 11,840   | 11,718   | 13,018   | 11,786   | 11,741   | 11,467   | 14,347   |                  |
| Valley                    | 5,504                                                       | 9,114    | 11,262   | 11,728   | 13,578   | 11,467   | 10,564   | 10,602   | 10,171   | 12,881   |                  |
| Glendive-Sidney Region    | 5,337                                                       | 9,451    | 12,071   | 13,003   | 14,078   | 12,288   | 11,175   | 11,389   | 11,013   | 12,336   | 12,200           |
| Dawson                    | 5,666                                                       | 9,306    | 12,897   | 13,407   | 14,374   | 13,330   | 12,181   | 12,219   | 11,808   | 12,647   |                  |
| Garfield                  | 5,083                                                       | 13,594   | 12,263   | 12,196   | 15,078   | 12,050   | 10,475   | 9,127    | 8,571    | 14,408   |                  |
| McCone                    | 4,083                                                       | 9,575    | 10,706   | 12,366   | 15,614   | 11,884   | 9,850    | 10,285   | 9,472    | 12,922   |                  |
| Prairie                   | 5,309                                                       | 8,117    | 10,384   | 11,691   | 11,298   | 9,417    | 8,907    | 9,046    | 9,171    | 11,957   |                  |
| Richland                  | 5,140                                                       | 9,062    | 12,046   | 13,068   | 14,453   | 12,067   | 11,112   | 11,501   | 11,358   | 11,848   |                  |
| Wibaux                    | 8,470                                                       | 9,496    | 9,933    | 11,319   | 12,049   | 10,362   | 9,480    | 10,310   | 9,268    | 11,367   |                  |
| Great Falls Region        | 7,899                                                       | 10,205   | 12,887   | 13,066   | 13,267   | 12,863   | 12,622   | 12,567   | 12,369   | 13,493   | 13,500           |
| Cascade                   | 8,376                                                       | 10,312   | 13,257   | 13,340   | 13,222   | 13,113   | 13,096   | 13,396   | 13,251   | 13,775   |                  |
| Chouteau                  | 8,920                                                       | 12,154   | 11,001   | 11,111   | 15,138   | 13,341   | 12,318   | 10,788   | 10,582   | 14,604   |                  |
| Glacier                   | 5,778                                                       | 8,111    | 13,029   | 13,102   | 12,199   | 11,678   | 11,064   | 10,512   | 10,262   | 11,465   |                  |
| Pondera                   | 7,065                                                       | 10,149   | 10,841   | 11,582   | 12,684   | 11,765   | 11,070   | 10,200   | 9,445    | 12,249   |                  |
| Teton                     | 7,355                                                       | 10,388   | 10,807   | 11,867   | 13,026   | 11,951   | 11,156   | 10,588   | 10,347   | 13,392   |                  |
| Toole                     | 8,949                                                       | 10,297   | 14,144   | 14,599   | 14,919   | 13,482   | 12,859   | 11,977   | 11,733   | 14,050   |                  |
| Havre Region              | 7,550                                                       | 9,225    | 11,787   | 11,883   | 12,815   | 11,742   | 11,544   | 10,737   | 10,395   | 12,527   | 12,400           |
| Blaine                    | 5,702                                                       | 7,182    | 9,571    | 9,350    | 10,386   | 9,319    | 9,172    | 8,794    | 8,348    | 10,257   |                  |
| Hill                      | 7,823                                                       | 9,351    | 12,569   | 12,576   | 13,271   | 12,289   | 11,984   | 11,489   | 11,128   | 12,787   |                  |
| Liberty                   | 11,069                                                      | 12,717   | 12,757   | 14,099   | 16,413   | 14,483   | 14,881   | 10,662   | 10,909   | 17,410   |                  |
| Helena Region             | 8,173                                                       | 10,329   | 13,324   | 13,243   | 13,191   | 13,136   | 13,059   | 13,084   | 13,207   | 13,223   | 13,400           |
| Broadwater                | 6,235                                                       | 7,700    | 11,458   | 10,531   | 10,200   | 9,332    | 9,487    | 9,372    | 8,889    | 10,728   |                  |
| Jefferson                 | 6,026                                                       | 7,768    | 11,872   | 12,327   | 12,217   | 12,349   | 12,339   | 12,328   | 12,545   | 13,033   |                  |
| Lewis & Clark             | 8,700                                                       | 10,936   | 13,715   | 13,598   | 13,569   | 13,568   | 13,495   | 13,451   | 13,448   |          |                  |
| Kalispell Region          | 7,409                                                       | 8,851    | 11,705   | 11,159   | 11,002   | 10,590   | 11,067   | 11,192   | 10,985   | 11,009   | 11,100           |
| Flathead                  | 7,798                                                       | 9,441    | 13,121   | 12,501   | 12,262   | 11,861   | 12,538   | 12,658   | 12,298   | 12,036   |                  |
| Lake                      | 5,499                                                       | 7,094    | 9,966    | 9,592    | 9,367    | 9,162    | 9,518    | 9,594    | 9,728    | 10,216   |                  |
| Lincoln                   | 8,875                                                       | 9,554    | 10,520   | 9,606    | 9,955    | 9,421    | 10,042   | 9,809    | 9,504    | 9,812    |                  |
| Sanders                   | 6,517                                                       | 7,426    | 9,345    | 9,765    | 9,216    | 8,729    | 9,025    | 9,236    | 8,620    | 9,119    |                  |
| Lewistown Region          | 8,661                                                       | 9,916    | 12,263   | 11,918   | 12,265   | 11,049   | 10,866   | 10,687   | 10,334   | 11,955   | 11,700           |
| Fergus                    | 8,901                                                       | 9,706    | 12,798   | 12,276   | 12,479   | 11,219   | 11,311   | 10,973   | 10,533   | 11,953   |                  |
| Golden Valley             | 6,394                                                       | 9,400    | 10,949   | 10,443   | 11,128   | 10,350   | 9,656    | 10,150   | 9,871    | 13,097   |                  |
| Judith Basin              | 7,984                                                       | 10,942   | 10,506   | 10,169   | 9,902    | 9,098    | 9,677    | 9,771    | 9,177    | 11,555   |                  |
| Mississipp                | 5,486                                                       | 9,782    | 12,295   | 13,046   | 13,356   | 12,365   | 11,525   | 10,945   | 10,836   | 11,505   |                  |
| Petroleum                 | 5,940                                                       | 8,109    | 8,830    | 6,807    | 9,180    | 6,516    | 5,431    | 5,147    | 5,645    | 10,263   |                  |
| Wheatland                 | 6,384                                                       | 10,755   | 12,775   | 11,860   | 13,175   | 11,755   | 10,894   | 11,482   | 11,537   | 13,698   |                  |
| Missoula City Region      | 6,639                                                       | 9,993    | 12,932   | 13,205   | 13,226   | 12,837   | 11,981   | 11,685   | 11,328   | 11,869   | 11,800           |
| Carter                    | 5,174                                                       | 11,694   | 13,075   | 11,731   | 10,579   | 7,757    | 7,467    | 8,973    | 8,286    | 12,026   |                  |
| Custer                    | 7,221                                                       | 10,452   | 13,753   | 14,119   | 13,136   | 12,036   | 12,642   | 12,923   | 12,986   | 13,076   |                  |
| Fallon                    | 5,316                                                       | 9,132    | 16,089   | 15,859   | 15,178   | 13,971   | 12,641   | 13,111   | 12,219   | 12,706   |                  |
| Powder River              | 8,924                                                       | 10,297   | 15,161   | 13,356   | 13,725   | 12,268   | 11,168   | 10,459   | 10,147   | 12,516   |                  |
| Rosebud                   | 5,691                                                       | 8,415    | 10,857   | 10,974   | 12,932   | 13,596   | 11,665   | 10,153   | 9,913    | 10,048   |                  |
| Treasure                  | 6,412                                                       | 12,856   | 13,816   | 16,083   | 13,705   | 12,110   | 12,078   | 10,702   | 11,864   | 14,100   |                  |
| Missoula Region           | 7,688                                                       | 8,977    | 12,236   | 11,611   | 11,178   | 11,060   | 11,436   | 11,859   | 11,660   | 11,661   | 11,700           |
| Mineret                   | 5,367                                                       | 8,464    | 9,898    | 9,381    | 9,723    | 8,963    | 10,197   | 9,966    | 9,753    | 9,494    |                  |
| Missoula                  | 8,110                                                       | 9,266    | 12,826   | 12,168   | 11,624   | 11,615   | 11,965   | 12,285   | 12,222   | 12,171   |                  |
| Revalli                   | 6,727                                                       | 7,931    | 10,625   | 10,101   | 9,936    | 9,602    | 9,961    | 10,025   | 10,187   | 10,367   |                  |

\* NOTE: State totals are based on the latest available county data (April, 1988). Revised statewide data (August, 1988) is used in other chapters.

Source: U.S. Bureau of Economic Analysis (1959-1986 data) and Bureau of Business and Economic Research, University of Montana (1987 data).

Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars. 1987 estimates are preliminary.

Table 2.16

| REGION                    | PER CAPITA INCOME AS A PERCENT OF MONTANA AVERAGE<br>BY REGION AND COUNTY |      |      |      |      |      |      |      |      |      |      | 1987<br>Estimate |
|---------------------------|---------------------------------------------------------------------------|------|------|------|------|------|------|------|------|------|------|------------------|
|                           | 1959                                                                      | 1969 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 |                  |
| Montana                   | 100%                                                                      | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100%             |
| Billings Region           | 109%                                                                      | 105% | 110% | 110% | 109% | 111% | 111% | 111% | 110% | 107% | 107% |                  |
| Big Horn                  | 73%                                                                       | 85%  | 87%  | 93%  | 92%  | 85%  | 81%  | 82%  | 81%  | 90%  |      |                  |
| Carbon                    | 80%                                                                       | 94%  | 86%  | 94%  | 93%  | 92%  | 87%  | 86%  | 89%  | 90%  |      |                  |
| Stillwater                | 90%                                                                       | 105% | 92%  | 101% | 100% | 100% | 101% | 101% | 97%  | 99%  |      |                  |
| Sweet Grass               | 78%                                                                       | 99%  | 106% | 103% | 100% | 95%  | 98%  | 99%  | 100% | 108% |      |                  |
| Yellowstone               | 120%                                                                      | 109% | 115% | 114% | 113% | 116% | 116% | 116% | 115% | 110% |      |                  |
| Bozeman Region            | 95%                                                                       | 85%  | 93%  | 92%  | 92%  | 93%  | 96%  | 98%  | 99%  | 96%  | 96%  |                  |
| Gallatin                  | 96%                                                                       | 83%  | 91%  | 90%  | 90%  | 92%  | 96%  | 98%  | 99%  | 93%  |      |                  |
| Meagher                   | 101%                                                                      | 91%  | 94%  | 89%  | 91%  | 87%  | 82%  | 80%  | 76%  | 95%  |      |                  |
| Park                      | 92%                                                                       | 89%  | 102% | 98%  | 97%  | 98%  | 98%  | 101% | 102% | 104% |      |                  |
| Butte Region              | 99%                                                                       | 89%  | 95%  | 93%  | 96%  | 97%  | 97%  | 97%  | 98%  | 98%  | 99%  |                  |
| Beaverhead                | 107%                                                                      | 90%  | 99%  | 89%  | 92%  | 90%  | 89%  | 90%  | 90%  | 95%  |      |                  |
| Deer Lodge                | 81%                                                                       | 80%  | 86%  | 81%  | 79%  | 78%  | 81%  | 83%  | 84%  | 87%  |      |                  |
| Granite                   | 100%                                                                      | 78%  | 94%  | 90%  | 88%  | 86%  | 92%  | 90%  | 87%  | 88%  |      |                  |
| Madison                   | 81%                                                                       | 84%  | 96%  | 89%  | 88%  | 81%  | 80%  | 83%  | 87%  | 93%  |      |                  |
| Powell                    | 100%                                                                      | 86%  | 85%  | 84%  | 85%  | 89%  | 89%  | 90%  | 91%  | 90%  |      |                  |
| Silver Bow                | 107%                                                                      | 94%  | 98%  | 100% | 106% | 109% | 109% | 106% | 107% | 106% |      |                  |
| Glasgow-Wolf Point Region | 72%                                                                       | 97%  | 88%  | 91%  | 101% | 93%  | 86%  | 86%  | 83%  | 99%  | 99%  |                  |
| Daniels                   | 78%                                                                       | 119% | 96%  | 102% | 117% | 120% | 95%  | 89%  | 87%  | 127% |      |                  |
| Phillips                  | 79%                                                                       | 85%  | 85%  | 86%  | 92%  | 82%  | 75%  | 77%  | 71%  | 91%  |      |                  |
| Roosevelt                 | 60%                                                                       | 91%  | 81%  | 84%  | 86%  | 83%  | 81%  | 80%  | 80%  | 85%  |      |                  |
| Sheridan                  | 79%                                                                       | 108% | 93%  | 96%  | 118% | 108% | 98%  | 98%  | 97%  | 116% |      |                  |
| Valley                    | 76%                                                                       | 97%  | 90%  | 95%  | 109% | 95%  | 88%  | 89%  | 86%  | 104% |      |                  |
| Glendive-Sidney Region    | 73%                                                                       | 101% | 97%  | 106% | 113% | 102% | 95%  | 95%  | 93%  | 100% | 98%  |                  |
| Dawson                    | 78%                                                                       | 100% | 104% | 110% | 115% | 111% | 102% | 102% | 100% | 102% |      |                  |
| Garfield                  | 70%                                                                       | 145% | 99%  | 99%  | 121% | 100% | 88%  | 76%  | 72%  | 116% |      |                  |
| McCone                    | 56%                                                                       | 102% | 86%  | 100% | 108% | 99%  | 82%  | 86%  | 80%  | 104% |      |                  |
| Prairie                   | 76%                                                                       | 87%  | 85%  | 95%  | 91%  | 78%  | 74%  | 81%  | 78%  | 97%  |      |                  |
| Richland                  | 71%                                                                       | 97%  | 97%  | 106% | 116% | 100% | 93%  | 96%  | 96%  | 96%  |      |                  |
| Wibaux                    | 92%                                                                       | 102% | 80%  | 92%  | 97%  | 86%  | 79%  | 86%  | 78%  | 92%  |      |                  |
| Great Falls Region        | 109%                                                                      | 109% | 104% | 106% | 106% | 107% | 105% | 105% | 105% | 109% | 109% |                  |
| Cascade                   | 115%                                                                      | 110% | 106% | 108% | 106% | 109% | 109% | 112% | 112% | 111% |      |                  |
| Chouteau                  | 123%                                                                      | 130% | 88%  | 90%  | 121% | 111% | 103% | 90%  | 90%  | 118% |      |                  |
| Glacier                   | 79%                                                                       | 87%  | 105% | 106% | 98%  | 97%  | 92%  | 88%  | 87%  | 93%  |      |                  |
| Pondera                   | 97%                                                                       | 109% | 87%  | 94%  | 102% | 98%  | 93%  | 85%  | 80%  | 94%  |      |                  |
| Teton                     | 101%                                                                      | 111% | 87%  | 95%  | 104% | 99%  | 93%  | 88%  | 88%  | 108% |      |                  |
| Toole                     | 96%                                                                       | 110% | 114% | 119% | 120% | 112% | 107% | 100% | 99%  | 113% |      |                  |
| Havre Region              | 103%                                                                      | 99%  | 95%  | 96%  | 105% | 97%  | 96%  | 90%  | 88%  | 101% | 100% |                  |
| Blaine                    | 78%                                                                       | 77%  | 77%  | 76%  | 83%  | 77%  | 77%  | 75%  | 71%  | 85%  |      |                  |
| Hill                      | 108%                                                                      | 102% | 101% | 102% | 106% | 102% | 100% | 96%  | 94%  | 103% |      |                  |
| Liberty                   | 152%                                                                      | 136% | 102% | 114% | 132% | 120% | 124% | 89%  | 92%  | 141% |      |                  |
| Helena Region             | 112%                                                                      | 110% | 107% | 108% | 106% | 109% | 109% | 109% | 112% | 107% | 108% |                  |
| Broadwater                | 86%                                                                       | 82%  | 92%  | 86%  | 82%  | 77%  | 79%  | 78%  | 75%  | 87%  |      |                  |
| Jefferson                 | 83%                                                                       | 83%  | 95%  | 100% | 98%  | 102% | 103% | 103% | 106% | 105% |      |                  |
| Lewis & Clark             | 120%                                                                      | 117% | 110% | 110% | 109% | 112% | 112% | 113% | 115% | 109% |      |                  |
| Kalispell Region          | 102%                                                                      | 95%  | 94%  | 91%  | 88%  | 86%  | 92%  | 93%  | 93%  | 89%  | 90%  |                  |
| Flathead                  | 107%                                                                      | 101% | 105% | 102% | 98%  | 98%  | 103% | 106% | 104% | 97%  |      |                  |
| Lake                      | 76%                                                                       | 76%  | 80%  | 78%  | 75%  | 76%  | 80%  | 82%  | 82%  | 82%  |      |                  |
| Lincoln                   | 122%                                                                      | 102% | 85%  | 78%  | 80%  | 78%  | 84%  | 80%  | 80%  | 78%  |      |                  |
| Sanders                   | 90%                                                                       | 79%  | 77%  | 79%  | 74%  | 72%  | 75%  | 77%  | 73%  | 74%  |      |                  |
| Lewistown Region          | 92%                                                                       | 106% | 99%  | 97%  | 98%  | 92%  | 91%  | 89%  | 87%  | 97%  | 94%  |                  |
| Fergus                    | 95%                                                                       | 104% | 103% | 100% | 100% | 93%  | 95%  | 92%  | 89%  | 97%  |      |                  |
| Golden Valley             | 88%                                                                       | 101% | 88%  | 85%  | 89%  | 86%  | 79%  | 85%  | 85%  | 106% |      |                  |
| Judith Basin              | 110%                                                                      | 117% | 84%  | 83%  | 79%  | 75%  | 79%  | 82%  | 78%  | 95%  |      |                  |
| Musselshell               | 75%                                                                       | 105% | 99%  | 106% | 107% | 105% | 96%  | 91%  | 90%  | 91%  |      |                  |
| Petroleum                 | 82%                                                                       | 87%  | 71%  | 55%  | 74%  | 54%  | 45%  | 43%  | 48%  | 83%  |      |                  |
| Wheatland                 | 88%                                                                       | 115% | 103% | 96%  | 106% | 96%  | 91%  | 96%  | 98%  | 111% |      |                  |
| Miles City Region         | 89%                                                                       | 107% | 104% | 107% | 106% | 107% | 100% | 96%  | 96%  | 96%  | 95%  |                  |
| Custer                    | 71%                                                                       | 125% | 105% | 95%  | 85%  | 64%  | 62%  | 75%  | 70%  | 97%  |      |                  |
| Fallon                    | 99%                                                                       | 112% | 110% | 115% | 105% | 105% | 106% | 108% | 110% | 106% |      |                  |
| Powder River              | 95%                                                                       | 110% | 122% | 108% | 110% | 102% | 95%  | 89%  | 86%  | 101% |      |                  |
| Rosebud                   | 78%                                                                       | 90%  | 86%  | 89%  | 104% | 113% | 99%  | 85%  | 84%  | 81%  |      |                  |
| Treasure                  | 88%                                                                       | 138% | 111% | 151% | 110% | 100% | 101% | 89%  | 100% | 114% |      |                  |
| Missoula Region           | 106%                                                                      | 96%  | 98%  | 94%  | 90%  | 92%  | 96%  | 97%  | 99%  | 94%  | 94%  |                  |
| Mineral                   | 74%                                                                       | 91%  | 80%  | 76%  | 78%  | 74%  | 85%  | 83%  | 82%  | 77%  |      |                  |
| Missoula                  | 111%                                                                      | 99%  | 105% | 99%  | 95%  | 96%  | 100% | 102% | 105% | 98%  |      |                  |
| Ravalli                   | 92%                                                                       | 85%  | 85%  | 82%  | 80%  | 80%  | 83%  | 84%  | 86%  | 84%  |      |                  |

Source: U.S. Bureau of Economic Analysis. Regional data and percentages computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. 1987 estimates are preliminary.

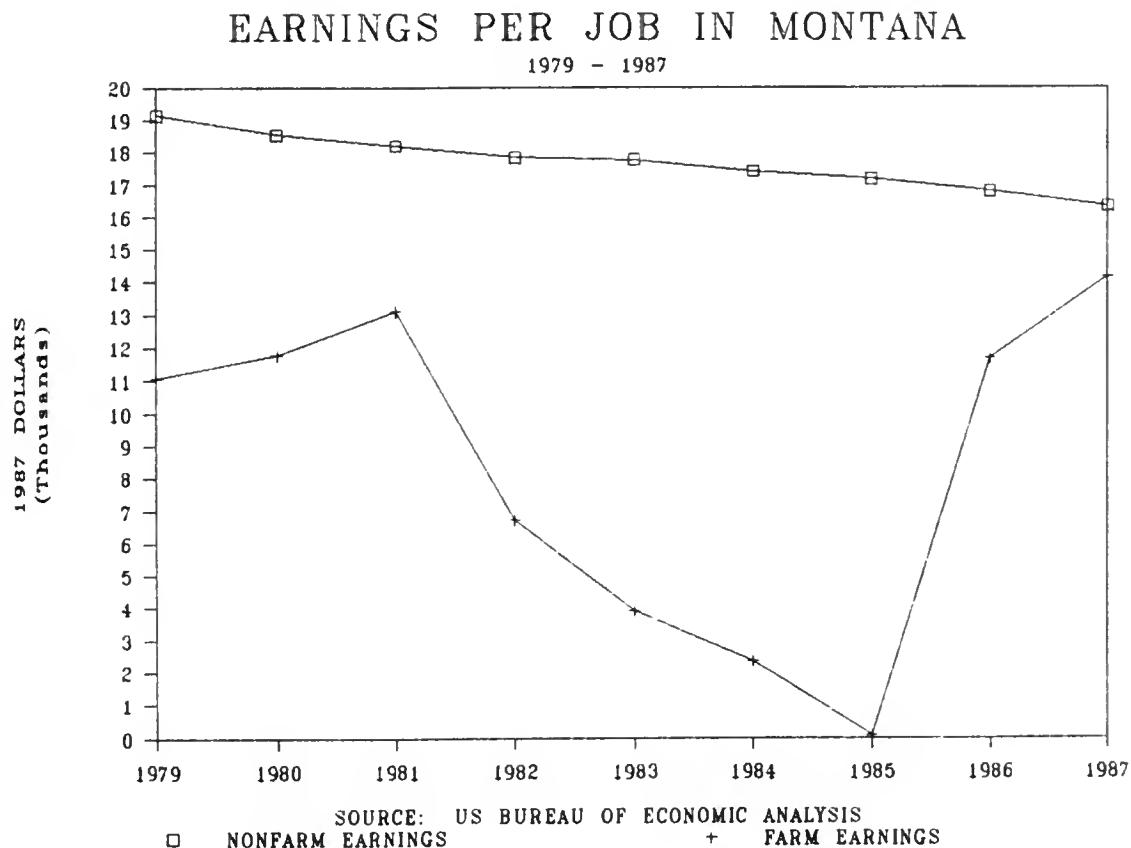
Table 2.17

EARNINGS PER JOB IN MONTANA: 1969 - 1986  
(in 1987 dollars)

| YEAR | FARM EARNINGS<br>PER FARM<br>EMPLOYEE | NONFARM<br>EARNINGS PER<br>NONFARM EMPLOYEE |
|------|---------------------------------------|---------------------------------------------|
| 1969 | 19,161                                | 17,519                                      |
| 1979 | 11,077                                | 19,141                                      |
| 1980 | 11,763                                | 18,538                                      |
| 1981 | 13,113                                | 18,202                                      |
| 1982 | 6,724                                 | 17,839                                      |
| 1983 | 3,925                                 | 17,763                                      |
| 1984 | 2,350                                 | 17,402                                      |
| 1985 | 518                                   | 17,135                                      |
| 1986 | 13,324                                | 16,746                                      |

Source: U.S. Bureau of Economic Analysis. Regional data computed by the Office of Research and Information Services, Montana Department of Commerce, 1988. The implicit price deflator for personal consumption expenditures was used to convert the original data to 1987 dollars.

Figure 2.13



## The Billings Region

Located in south central Montana, the Billings Region includes Big Horn, Carbon, Stillwater, Sweetgrass, and Yellowstone counties.

### Labor Force

The Billings Region, the most populous, ranked first in the number of total jobs in 1986. The region's 78,788 jobs accounted for 19.3 percent of all jobs in the state, up from 16.2 percent in 1969 (Figures 2.3 and 2.14). Most of the jobs were in Yellowstone County, ranking it first among counties in 1986 for total jobs.

Total jobs growth in the Billings Region was steady during the 1970s until 1979 when a decline in jobs throughout the state impeded growth (Table 2.18). Growth continued in the early 1980s--even during 1981 when jobs once again declined statewide. From 1984 until 1986, however, a marked decline in wage/salary jobs took place statewide, but a steady increase in the number of self-employed offset this decline, producing modest growth. The increase in the number of self-employed in the Billings Region, however, was low, and a large decline in wage/salary jobs from 1984 to 1986 (principally in Yellowstone County) resulted in total number of jobs in the region declining during 1984-1985 (Table 2.18). This decline reversed slightly during the following year, but even into 1986-1987, the decline in wage/salary jobs continued, although the loss was much smaller than in previous years (Table 2.19).

The importance of the self-employed to both the Montana economy and the Billings Region economy is evident in Table 2.5. From 1979 to 1986, wage/salary jobs in the Billings Region grew only 0.1 percent, with a period of growth from 1979 to 1984 followed by an offsetting decline from 1984 to 1986. However, during this period, the number of self-employed increased by 40.8 percent, an increase second only to the Helena Region. Because of this extraordinary growth, the total number of jobs in the Billings Region grew by 7.7 percent between 1979 and 1986, for an average annual growth rate of 1.1 percent.

Historically, key industries in this region have included (in order by share in the total number of jobs) services, retail trade, and government, followed distantly by agriculture and manufacturing. This order reflects the relative importance of industries at the state level, but agriculture and government occupy a smaller share of total jobs in the Billings Region than they do statewide. In Montana, agriculture accounted for 9 percent of total jobs in 1986, while in the Billings Region it was 6 percent. Statewide, government (local, state, and federal) accounted for 18 percent, while it was only 13 percent in the region. In contrast, wholesale trade, retail trade, and services relatively are more important, and indicate the importance of Yellowstone County as a trade and service center for eastern Montana and northern Wyoming.

The 1970s exhibited strong job growth for almost all sectors in the Billings

Region, with agriculture as the single exception. Slow growth, however, characterized the 1980s. Health and business services and retail trade expanded, while manufacturing (particularly food/kindred products, and lumber/wood products) construction, and railroad (Burlington Northern reorganization) jobs declined. The closing of two major meat-packing plants--the Pierce packing plant in late 1984 and the Midland plant in early 1985--resulted in the loss of several hundred manufacturing jobs. By 1985, both total jobs and wage/salary jobs had begun to decline. And, the closure of the Boise Cascade modular home manufacturing facility added to that decline. Between 1984 and 1986, wage/salary job declines were prevalent in nearly every major industry group in the Billings Region, with services as the only group that posted a significant increase.

During 1986-1987, many of these declines continued (Table 2.19), causing total wage/salary jobs to decline by 0.7 percent. Declining industries included construction, oil/gas extraction, local and interurban passenger transit, and state and local government. Renewed growth, however, characterized several of the larger sectors in 1986-1987 as retail trade, finance/insurance/real estate, and services all showed moderate growth. Private health services grew by more than 300 jobs, excluding the self-employed, providing the largest increase in wage/salary jobs among the regional industries.

Throughout the 1970s and the first half of the 1980s, the unemployment rate in the Billings Region consistently was below the statewide unemployment rate (Figure 2.16). Since 1985, the region's unemployment rate has been slightly higher than the statewide average. In 1987, the unemployment rate in the region ranked eighth out of the 12 regions. Carbon, Stillwater, Sweet Grass, and Yellowstone counties ranked in the middle of the statewide range, but Big Horn County ranked last at 13.6 percent.

### Population

The Billings Region has experienced rapid growth since 1950, and ranked first in total population in 1987. Historically, the region experienced a decline or low population growth only in the 1920s and the 1960s (Table 2.8). More recently, population increased by 31 percent between 1969 and 1987, nearly twice the statewide 17 percent increase. After peaking in 1985 at 150,100, however, population declined slightly in 1986 and 1987 to 146,700, reflecting a statewide trend. Table 2.18 shows that most of the regional population is found in Montana's most populous county--Yellowstone.

A close parallel between total jobs and population held for the Billings Region between 1969 and 1986 (Figures 2.14 and 2.15). Both population and total jobs experienced steady growth during the 1970s. But between 1979 and 1980, jobs fell slightly and population growth was basically zero. Then, until the mid-1980s, the moderate growth in jobs paralleled a steady population increase. Since 1984, jobs generally have declined; population growth first slowed and then turned negative between 1985 and 1987.

## Income

As in jobs and population, the Billings Region ranked first in total personal income in 1986 (Table 2.18). With more than 80 percent of the regional income, Yellowstone County accounted for the largest amount of income of any county in the state. Other counties in the region ranked in the middle of the distribution.

Changes in total personal income and its components basically have imitated changes at the state level (see Figure 2.17 for the Billings Region and Figure 2.11 for the state). The main difference is the relatively stronger total personal income growth in the Billings Region, which partially reflects the smaller share of total worker earnings represented by agriculture within Yellowstone County. Between 1979 and 1986, total personal income grew by 5.8 percent, nearly twice the statewide average of 3 percent (Table 2.10).

It is important to note that nearly all of this growth occurred in property income and transfer payments rather than in nonfarm and farm worker earnings. High interest rates during the 1980-1982 recession produced strong growth in property income during this period. Growth continued until 1984, but since then property income has remained relatively stable. Transfer payments experienced steady growth between 1979 and 1987.

In contrast, regional nonfarm worker earnings mimicked the state, increasing only in 1983 and 1984 and declining in every other year during the 1979-1987 period. The national recession during 1980-1982 and Montana recessions in 1985 and 1986 hindered the growth of nonfarm earnings.

After moderate growth in 1980, farm earnings declined until 1982 and then stagnated through 1985. After the end of a severe drought in 1985, growth in farm earnings returned in 1986 and 1987. A large increase in 1986 was sufficient to overcome declining nonfarm earnings, and total personal income increased. Growth of farm earnings the next year was more than offset by declining nonfarm earnings, and total personal income declined in 1987.

The Billings Region ranked first in per capita personal income for the 1982-1986 period. Historically, the region's per capita income generally has been well above the state average (Tables 2.15 and 2.16), reflecting the strong performance of Yellowstone County. Per capita income in Sweet Grass and Stillwater counties has been close to the Montana average, but consistently below the state average in Carbon and Big Horn counties.

As shown in Table 2.18, per capita income increased substantially in the 1960s and 1970s, growing from about \$8,000 in 1959 to well over \$13,000 in 1979. In recent years, however, performance has been erratic as a result of recessions coupled with population growth--two factors that tend to lower per capita income. Between 1979 and 1983, per capita income declined despite steady growth in total personal income because population growth also was strong. This decline was interrupted in 1984 with the recovery from the earlier recession, but continued in 1985 with the advent of a new recession in Montana. Between 1985 and 1987, however, population declined and per capita income once again posted increases.

Figure 2.14

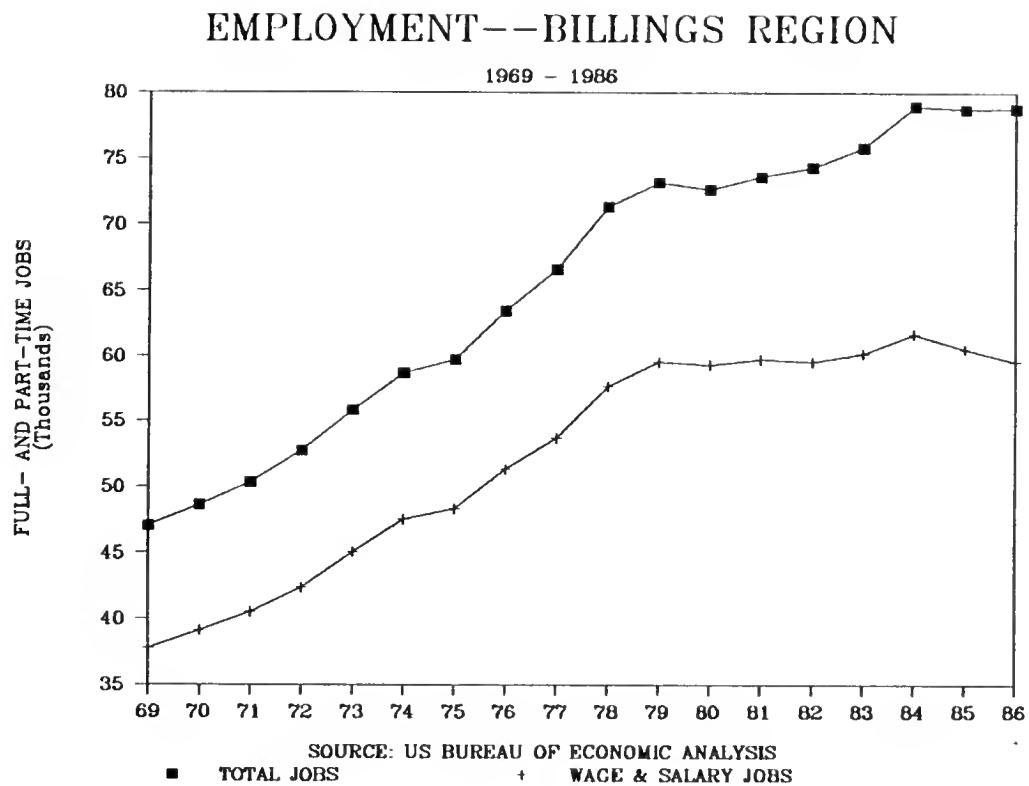


Figure 2.15

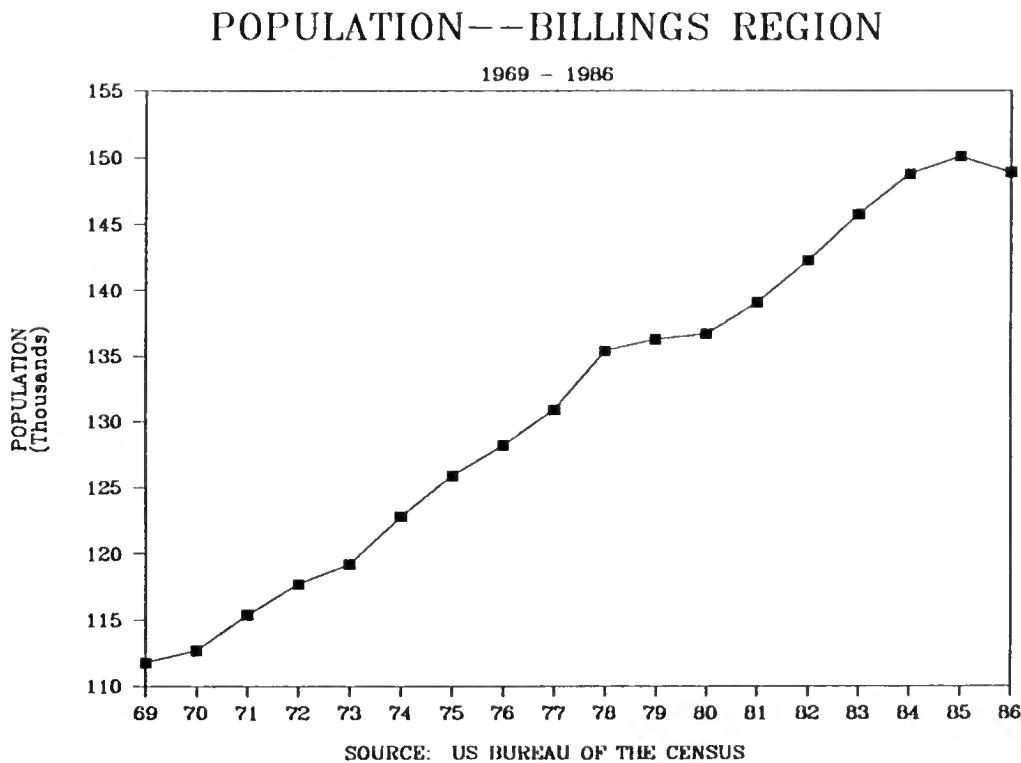


Table 2.18

|                                           | The Billings Region |           |           |           |           |           |           |           |           |           |           | Rank in State /d   |
|-------------------------------------------|---------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------------|
|                                           | 1959                | 1969      | 1979      | 1980      | 1981      | 1982      | 1983      | 1984      | 1985      | 1986      | 1987 /p   | (Region or County) |
| <b>Population /a</b>                      |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 105,200             | 111,800   | 136,300   | 136,700   | 139,100   | 142,300   | 145,800   | 148,800   | 150,100   | 148,900   | 146,700   | 1                  |
| Big Horn                                  | 9,900               | 10,100    | 10,900    | 11,200    | 11,400    | 11,400    | 11,300    | 11,500    | 11,600    | 11,200    | 11,000    | 18                 |
| Carbon                                    | 8,200               | 7,200     | 8,400     | 8,100     | 8,200     | 8,300     | 8,500     | 8,700     | 8,600     | 8,500     | 8,300     | 24                 |
| Stillwater                                | 5,500               | 4,700     | 5,800     | 5,600     | 5,700     | 5,800     | 5,900     | 6,100     | 6,100     | 6,000     | 6,200     | 31                 |
| Sweet Grass                               | 3,300               | 3,000     | 3,200     | 3,200     | 3,300     | 3,300     | 3,300     | 3,400     | 3,300     | 3,200     | 3,100     | 41                 |
| Yellowstone                               | 78,300              | 86,800    | 108,000   | 108,600   | 110,500   | 115,500   | 116,800   | 119,100   | 120,500   | 120,000   | 118,100   | 1                  |
| <b>Total Jobs /b</b>                      |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 47,060    | 73,188    | 72,706    | 73,651    | 74,348    | 75,849    | 78,958    | 78,732    | 78,788    | ...       | 1                  |
| Big Horn                                  | ...                 | 3,541     | 5,147     | 5,593     | 5,066     | 4,812     | 4,764     | 4,889     | 4,959     | 4,735     | ...       | 20                 |
| Carbon                                    | ...                 | 2,720     | 3,104     | 3,098     | 3,171     | 3,171     | 3,367     | 3,474     | 3,483     | 3,531     | ...       | 24                 |
| Stillwater                                | ...                 | 1,776     | 2,236     | 2,227     | 2,244     | 2,268     | 2,325     | 2,395     | 2,390     | 2,479     | ...       | 36                 |
| Sweet Grass                               | ...                 | 1,357     | 1,531     | 1,502     | 1,520     | 1,535     | 1,534     | 1,593     | 1,586     | 1,584     | ...       | 39                 |
| Yellowstone                               | ...                 | 37,066    | 61,170    | 60,286    | 61,650    | 62,562    | 63,859    | 66,607    | 66,314    | 66,459    | ...       | 1                  |
| <b>Wage &amp; Salary Jobs /b</b>          |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 37,768    | 59,537    | 59,310    | 59,738    | 59,571    | 60,196    | 61,691    | 60,569    | 59,567    | ...       | 1                  |
| Big Horn                                  | ...                 | 2,556     | 4,154     | 4,626     | 4,139     | 3,854     | 3,752     | 3,817     | 3,858     | 3,596     | ...       | 20                 |
| Carbon                                    | ...                 | 1,462     | 1,808     | 1,808     | 1,879     | 1,851     | 1,924     | 1,949     | 1,922     | 1,916     | ...       | 28                 |
| Stillwater                                | ...                 | 948       | 1,364     | 1,405     | 1,425     | 1,368     | 1,397     | 1,439     | 1,411     | 1,465     | ...       | 36                 |
| Sweet Grass                               | ...                 | 832       | 966       | 950       | 976       | 949       | 920       | 944       | 919       | 892       | ...       | 41                 |
| Yellowstone                               | ...                 | 31,970    | 51,245    | 50,521    | 51,319    | 51,569    | 52,203    | 53,542    | 52,459    | 51,698    | ...       | 1                  |
| <b>Unemployment Rate /c</b>               |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 4.2%      | 3.7%      | 4.8%      | 5.5%      | 6.7%      | 7.9%      | 7.2%      | 7.5%      | 8.2%      | 7.6%      | 8                  |
| Big Horn                                  | ...                 | 4.6%      | 5.0%      | 6.4%      | 9.2%      | 9.1%      | 8.5%      | 8.8%      | 10.2%     | 14.6%     | 13.6%     | 50                 |
| Carbon                                    | ...                 | 4.9%      | 4.3%      | 4.4%      | 4.6%      | 7.2%      | 7.4%      | 7.4%      | 8.1%      | 7.4%      | ...       | 32                 |
| Stillwater                                | ...                 | 3.8%      | 3.3%      | 3.8%      | 4.0%      | 8.5%      | 11.2%     | 8.6%      | 7.7%      | 8.3%      | 6.5%      | 21                 |
| Sweet Grass                               | ...                 | 1.4%      | 1.2%      | 2.1%      | 3.4%      | 4.5%      | 4.8%      | 6.0%      | 6.4%      | 7.5%      | 6.8%      | 25                 |
| Yellowstone                               | ...                 | 4.2%      | 3.7%      | 4.8%      | 5.3%      | 6.4%      | 7.8%      | 7.0%      | 7.3%      | 7.7%      | 7.2%      | 29                 |
| <b>Total Personal Income (\$1000s) /b</b> |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 836,456             | 1,097,914 | 1,862,145 | 1,859,532 | 1,887,774 | 1,905,800 | 1,929,641 | 1,972,854 | 1,955,255 | 1,971,015 | 1,956,000 | 1                  |
| Big Horn                                  | 52,676              | 77,850    | 117,923   | 127,215   | 130,571   | 116,285   | 110,317   | 113,555   | 111,817   | 124,778   | ...       | 19                 |
| Carbon                                    | 47,992              | 63,067    | 90,012    | 93,776    | 94,980    | 91,944    | 89,180    | 88,974    | 90,559    | 94,574    | ...       | 25                 |
| Stillwater                                | 36,057              | 46,328    | 64,466    | 69,783    | 70,797    | 69,511    | 71,396    | 73,557    | 70,576    | 73,705    | ...       | 33                 |
| Sweet Grass                               | 18,794              | 27,776    | 42,820    | 40,963    | 40,753    | 37,902    | 38,584    | 39,674    | 39,150    | 42,834    | ...       | 39                 |
| Yellowstone                               | 680,955             | 882,892   | 1,544,924 | 1,527,795 | 1,550,674 | 1,590,158 | 1,620,165 | 1,657,095 | 1,643,153 | 1,635,124 | ...       | 1                  |
| <b>Per Capita Personal Income /b</b>      |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 7,951               | 9,820     | 13,658    | 13,605    | 13,587    | 13,587    | 13,229    | 13,265    | 13,021    | 13,236    | 13,300    | 1                  |
| Big Horn                                  | 5,321               | 7,744     | 10,787    | 11,406    | 11,499    | 10,196    | 9,729     | 9,854     | 9,607     | 11,150    | ...       | 42                 |
| Carbon                                    | 5,853               | 8,756     | 10,715    | 11,553    | 11,620    | 11,057    | 10,457    | 10,269    | 10,555    | 11,099    | ...       | 36                 |
| Stillwater                                | 6,556               | 9,834     | 11,504    | 12,434    | 12,517    | 11,995    | 12,054    | 12,148    | 11,500    | 12,237    | ...       | 19                 |
| Sweet Grass                               | 5,695               | 9,225     | 15,200    | 12,696    | 12,470    | 11,503    | 11,735    | 11,815    | 11,831    | 13,373    | ...       | 17                 |
| Yellowstone                               | 8,696               | 10,169    | 14,306    | 14,072    | 14,054    | 14,004    | 13,873    | 13,911    | 13,636    | 13,631    | ...       | 1                  |
| <b>Honfarm Earnings (\$1000s) /b</b>      |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 600,981             | 779,621   | 1,408,352 | 1,373,423 | 1,335,282 | 1,334,778 | 1,357,554 | 1,384,823 | 1,368,480 | 1,331,437 | 1,309,000 | 1                  |
| Big Horn                                  | 27,785              | 37,465    | 102,681   | 122,177   | 96,449    | 85,076    | 82,638    | 84,159    | 85,687    | 82,206    | ...       | 17                 |
| Carbon                                    | 20,833              | 23,728    | 32,557    | 31,677    | 31,555    | 28,845    | 30,371    | 30,739    | 32,513    | 31,589    | ...       | 30                 |
| Stillwater                                | 13,637              | 15,707    | 24,517    | 25,410    | 25,664    | 22,995    | 23,747    | 25,160    | 24,993    | 26,077    | ...       | 36                 |
| Sweet Grass                               | 8,091               | 10,869    | 15,286    | 13,720    | 13,573    | 13,446    | 13,246    | 14,436    | 14,398    | 13,853    | ...       | 41                 |
| Yellowstone                               | 530,655             | 691,853   | 1,233,310 | 1,180,439 | 1,170,241 | 1,184,418 | 1,207,553 | 1,230,328 | 1,210,888 | 1,177,713 | ...       | 1                  |
| <b>Farm Earnings (\$1000s) /b</b>         |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 66,180              | 100,902   | 46,820    | 50,629    | 37,304    | 20,345    | 15,247    | 16,297    | 10,071    | 49,338    | 53,000    | 2                  |
| Big Horn                                  | 14,899              | 27,575    | 17,690    | 19,000    | 17,086    | 8,090     | 5,191     | 4,317     | 1,051     | 16,662    | ...       | 5                  |
| Carbon                                    | 12,438              | 16,065    | 6,479     | 8,147     | 6,751     | 3,302     | 589       | 868       | 1,390     | 6,915     | ...       | 27                 |
| Stillwater                                | 10,585              | 14,328    | 6,083     | 6,625     | 5,041     | 2,678     | 2,126     | 2,800     | 1,247     | 4,715     | ...       | 36                 |
| Sweet Grass                               | 4,847               | 8,359     | 8,487     | 7,250     | 5,756     | 2,824     | 2,508     | 2,395     | 1,854     | 6,419     | ...       | 29                 |
| Yellowstone                               | 23,412              | 34,573    | 8,081     | 9,607     | 2,669     | 3,451     | 4,833     | 5,919     | 4,549     | 14,626    | ...       | 8                  |
| <b>Property Income (\$1000s) /b</b>       |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 127,843             | 156,976   | 285,761   | 297,006   | 344,478   | 360,529   | 360,572   | 380,182   | 381,480   | 383,947   | 387,000   | 1                  |
| Big Horn                                  | 6,656               | 8,164     | 12,720    | 13,373    | 15,339    | 15,351    | 14,029    | 15,508    | 15,435    | 15,417    | ...       | 36                 |
| Carbon                                    | 6,996               | 10,784    | 20,984    | 22,727    | 25,756    | 26,754    | 26,249    | 27,593    | 27,354    | 27,255    | ...       | 17                 |
| Stillwater                                | 7,481               | 9,505     | 14,782    | 15,754    | 17,694    | 19,275    | 20,804    | 22,100    | 21,091    | 21,000    | ...       | 25                 |
| Sweet Grass                               | 4,014               | 5,768     | 11,320    | 11,663    | 13,053    | 13,193    | 14,346    | 14,439    | 14,219    | 14,146    | ...       | 38                 |
| Yellowstone                               | 102,690             | 122,756   | 225,954   | 233,489   | 272,657   | 285,956   | 285,145   | 300,541   | 305,580   | 306,130   | ...       | 1                  |
| <b>Transfer Payments (\$1000s) /b</b>     |                     |           |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 62,473              | 101,549   | 210,682   | 226,900   | 237,997   | 252,701   | 267,812   | 274,627   | 284,537   | 294,642   | 296,000   | 1                  |
| Big Horn                                  | 5,076               | 7,794     | 15,420    | 16,591    | 17,733    | 18,113    | 18,645    | 19,551    | 20,542    | 21,433    | ...       | 22                 |
| Carbon                                    | 6,745               | 8,971     | 16,825    | 18,013    | 18,543    | 18,778    | 19,798    | 19,981    | 20,367    | 20,986    | ...       | 23                 |
| Stillwater                                | 5,230               | 5,586     | 10,758    | 11,238    | 12,011    | 12,675    | 13,884    | 13,996    | 14,441    | 14,991    | ...       | 29                 |
| Sweet Grass                               | 2,035               | 3,090     | 5,393     | 5,884     | 6,358     | 6,551     | 6,723     | 6,986     | 7,323     | 7,455     | ...       | 40                 |
| Yellowstone                               | 45,388              | 76,308    | 162,286   | 175,174   | 183,553   | 196,583   | 208,761   | 214,114   | 221,664   | 229,779   | ...       | 1                  |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/e 1987 data consists of preliminary estimates.

Table 2.19

WAGE &amp; SALARY EMPLOYMENT IN THE BILLINGS REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|--------|-------------------|
| Total Wage and Salary Employment                    |               | \$1,437 | \$1,054 | (383)  | -0.7%             |
| Total Private                                       |               | 42,206  | 41,937  | (269)  | -0.6%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 528     | 532     | 4      | 0.8%              |
| Agricultural Production--Crops ***                  | 01            | 107     | 84      | (23)   | -21.5%            |
| Agricultural Production--Livestock ***              | 02            | 200     | 207     | 7      | 3.5%              |
| Agricultural Services                               | 07            | 217     | 237     | 20     | 9.2%              |
| Forestry                                            | 08            |         |         |        |                   |
| Fishing, Hunting, and Trapping                      | 09            |         |         |        |                   |
| Mining                                              |               | 1,264   | "0"     | "0"    | "0"               |
| Metal Mining                                        | 10            | 40      | "0"     | "0"    | "0"               |
| Coal Mining                                         | 12            | 647     | 615     | (32)   | -4.9%             |
| Oil and Gas Extraction                              | 13            | 423     | 280     | (143)  | -33.8%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 151     | 160     | 9      | 6.0%              |
| Construction                                        |               | 2,304   | 1,703   | (601)  | -26.1%            |
| General Building Contractors                        | 15            | 586     | 473     | (113)  | -19.3%            |
| Heavy Construction Contractors                      | 16            | 506     | 221     | (285)  | -56.3%            |
| Special Trade Contractors                           | 17            | 1,208   | 1,005   | (203)  | -16.8%            |
| Manufacturing                                       |               | 3,305   | 3,250   | (55)   | -1.7%             |
| Food and Kindred Products                           | 20            | 915     | 979     | 64     | 7.0%              |
| Textile Mill Products                               | 22            |         | "0"     | "0"    | "0"               |
| Apparel and Other Textile Products                  | 23            | 14      | "0"     | "0"    | "0"               |
| Lumber and Wood Products                            | 24            | 182     | 164     | (18)   | -9.9%             |
| Furniture and Fixtures                              | 25            | 44      | 55      | 11     | 25.0%             |
| Paper and Allied Products                           | 26            |         | "0"     | "0"    | "0"               |
| Printing and Publishing                             | 27            | 663     | 651     | (12)   | -1.8%             |
| Chemicals and Allied Products                       | 28            | 100     | 103     | 3      | 3.0%              |
| Petroleum Refining and Related Industries           | 29            | 523     | 488     | (35)   | -6.7%             |
| Rubber and Miscellaneous Plastic Products           | 30            | 18      | 28      | 10     | 55.6%             |
| Leather and Leather Products                        | 31            |         | "0"     | "0"    | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | 210     | 182     | (28)   | -13.3%            |
| Primary Metals Processing                           | 33            |         | "0"     | "0"    | "0"               |
| Fabricated Metal Products                           | 34            | 205     | 201     | (4)    | -2.0%             |
| Machinery, Except Electrical                        | 35            | 134     | 102     | (32)   | -23.9%            |
| Electrical and Electronic Equipment                 | 36            | "0"     | "0"     | "0"    | "0"               |
| Transportation Equipment                            | 37            | 74      | 84      | 10     | 13.5%             |
| Instruments and Related Products                    | 38            | "0"     | "0"     | "0"    | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | 203     | 179     | (24)   | -11.8%            |
| Transportation and Public Utilities                 |               | 3,512   | 3,228   | (284)  | -8.1%             |
| Local and Interurban Passenger Transit              | 41            | 274     | 156     | (118)  | -43.1%            |
| Trucking and Warehousing                            | 42            | 1,440   | 1,370   | (70)   | -4.9%             |
| Water Transportation                                | 44            |         |         |        |                   |
| Transportation by Air                               | 45            | 245     | 236     | (9)    | -3.7%             |
| Pipelines, Except Natural Gas                       | 46            | 87      | 67      | (20)   | -23.0%            |
| Transportation Services                             | 47            | 108     | 110     | 2      | 1.9%              |
| Communications                                      | 48            | 617     | 755     | (62)   | -7.6%             |
| Electric, Gas, and Sanitary Services                | 49            | 534     | 527     | (7)    | -1.3%             |
| Wholesale Trade                                     |               | 4,583   | 4,537   | (46)   | -1.0%             |
| Durable Goods                                       | 50            | 2,943   | 2,902   | (41)   | -1.4%             |
| Nondurable Goods                                    | 51            | 1,639   | 1,634   | (5)    | -0.3%             |
| Retail Trade                                        |               | 11,650  | 11,911  | 261    | 2.2%              |
| Building Materials and Hardware                     | 52            | 494     | 458     | (36)   | -7.3%             |
| General Merchandise Stores                          | 53            | 1,622   | 1,703   | 81     | 5.0%              |
| Food Stores                                         | 54            | 1,641   | 1,622   | (19)   | -1.2%             |
| Automotive Dealers and Service Stations             | 55            | 1,439   | 1,526   | 87     | 6.0%              |
| Apparel and Accessory Stores                        | 56            | 520     | 547     | 27     | 5.2%              |
| Furniture and Home Furnishings Stores               | 57            | 467     | 473     | 6      | 1.3%              |
| Eating and Drinking Places                          | 58            | 4,413   | 4,472   | 59     | 1.3%              |
| Miscellaneous Retail                                | 59            | 1,041   | 1,098   | 57     | 5.5%              |
| Finance, Insurance, and Real Estate                 |               | 2,710   | 2,762   | 52     | 1.9%              |
| Banking                                             | 60            | 1,064   | 1,066   | 2      | 0.2%              |
| Credit Agencies other than Banks                    | 61            | 333     | 331     | (2)    | -0.6%             |
| Security, Commodity Brokers, and Services           | 62            | 163     | 169     | 6      | 3.7%              |
| Insurance Carriers                                  | 63            | 140     | 175     | 35     | 25.0%             |
| Insurance Agents, Brokers, and Services             | 64            | 294     | 298     | 4      | 1.4%              |
| Real Estate                                         | 65            | 600     | 618     | 18     | 3.0%              |
| Combined Real Estate, Insurance, Etc.               | 66            | 32      | 29      | (3)    | -9.4%             |
| Holding and Other Investment Offices                | 67            | 76      | 69      | (7)    | -9.2%             |
| Services                                            |               | 12,317  | 12,720  | 403    | 3.3%              |
| Hotels and Other Lodging Places                     | 70            | 1,000   | 1,060   | 60     | 6.0%              |
| Personal Services                                   | 72            | 697     | 666     | (31)   | -4.4%             |
| Business Services                                   | 73            | 1,903   | 1,858   | (45)   | -2.4%             |
| Auto Repair, Services, and Garages                  | 75            | 435     | 440     | 5      | 1.1%              |
| Miscellaneous Repair Services                       | 76            | 271     | 284     | 13     | 4.8%              |
| Motion Pictures                                     | 78            | 87      | 83      | (4)    | -4.6%             |
| Amusement and Recreation Services                   | 79            | 511     | 517     | 6      | 1.2%              |
| Private Health Services                             | 80            | 4,285   | 4,632   | 347    | 8.1%              |
| Legal Services                                      | 81            | 481     | 498     | 17     | 3.5%              |
| Private Educational Services                        | 82            | 291     | 300     | 9      | 3.1%              |
| Private Social Services                             | 83            | 813     | 849     | 36     | 4.4%              |
| Museums, Art Galleries, Etc.                        | 84            | 18      | 20      | 2      | 11.1%             |
| Membership Organizations Including Tribal Gov't     | 86            | 590     | 582     | (8)    | -1.4%             |
| Private Households                                  | 88            | 68      | 69      | 1      | 1.5%              |
| Engineering, Accounting, and Other Services         | 89            | 840     | 830     | (10)   | -1.2%             |
| Non-Classifiable                                    | 99            | 15      | "0"     | "0"    | "0"               |
| Government                                          |               | 9,229   | 9,115   | (114)  | -1.2%             |
| State                                               |               | 1,302   | 1,176   | (126)  | -9.7%             |
| Local                                               |               | 5,749   | 5,685   | (64)   | -1.1%             |
| Federal                                             |               | 2,171   | 2,248   | 77     | 3.5%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1980.

Figure 2.16

## UNEMPLOYMENT RATE—BILLINGS REGION

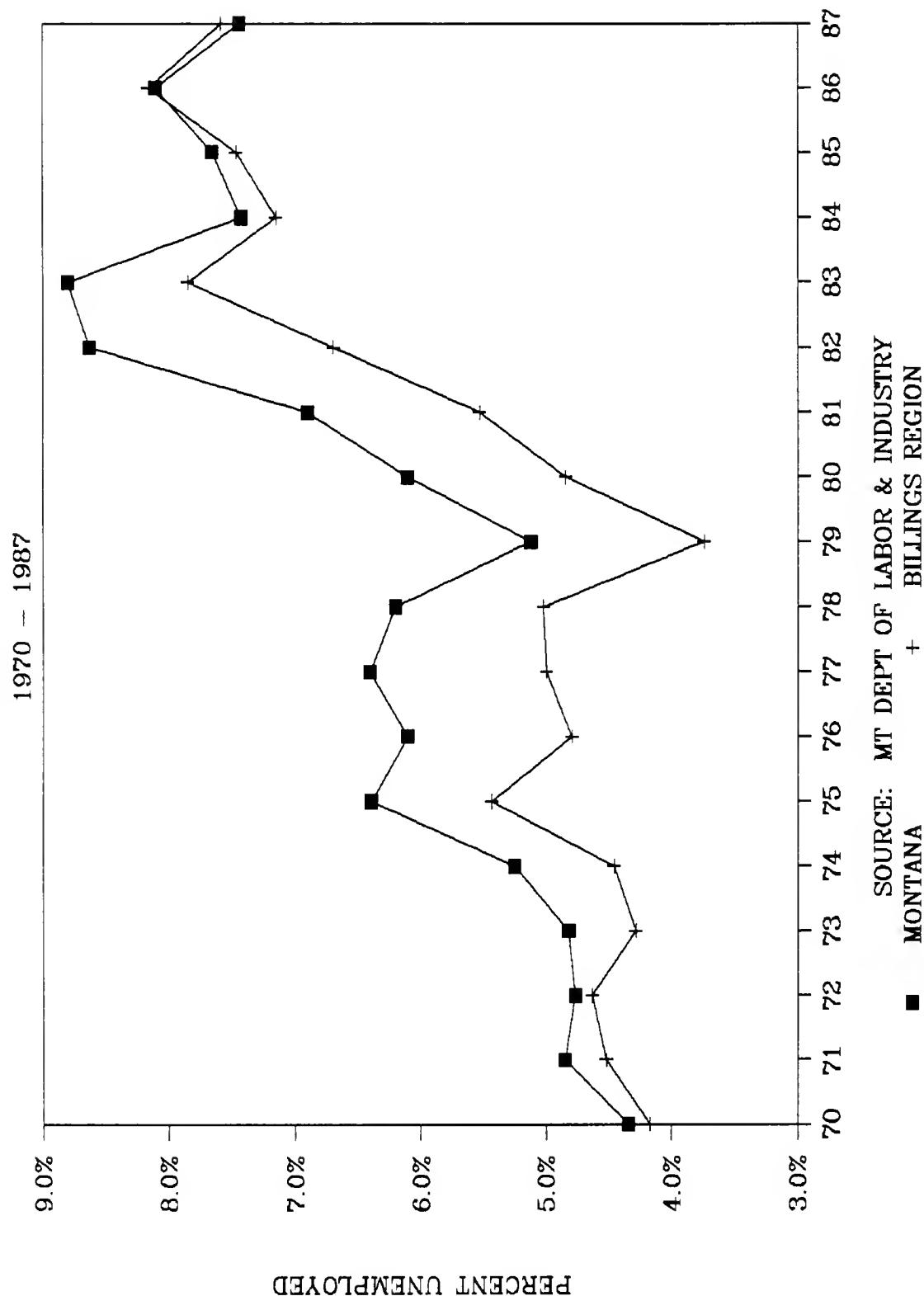
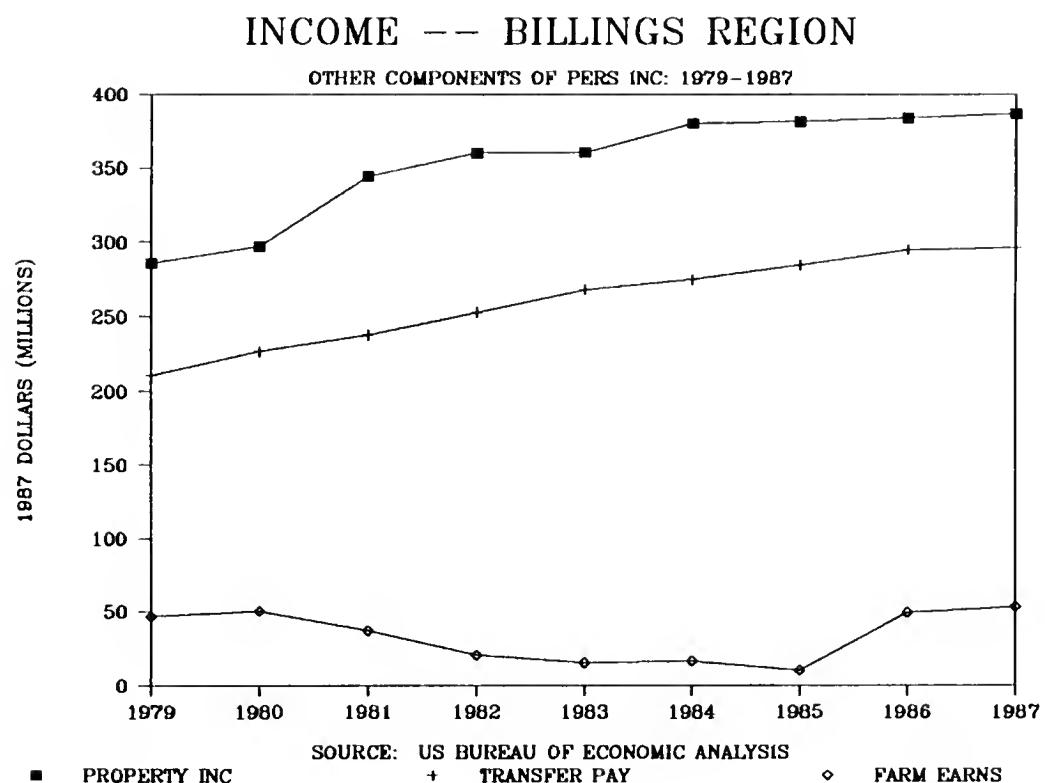
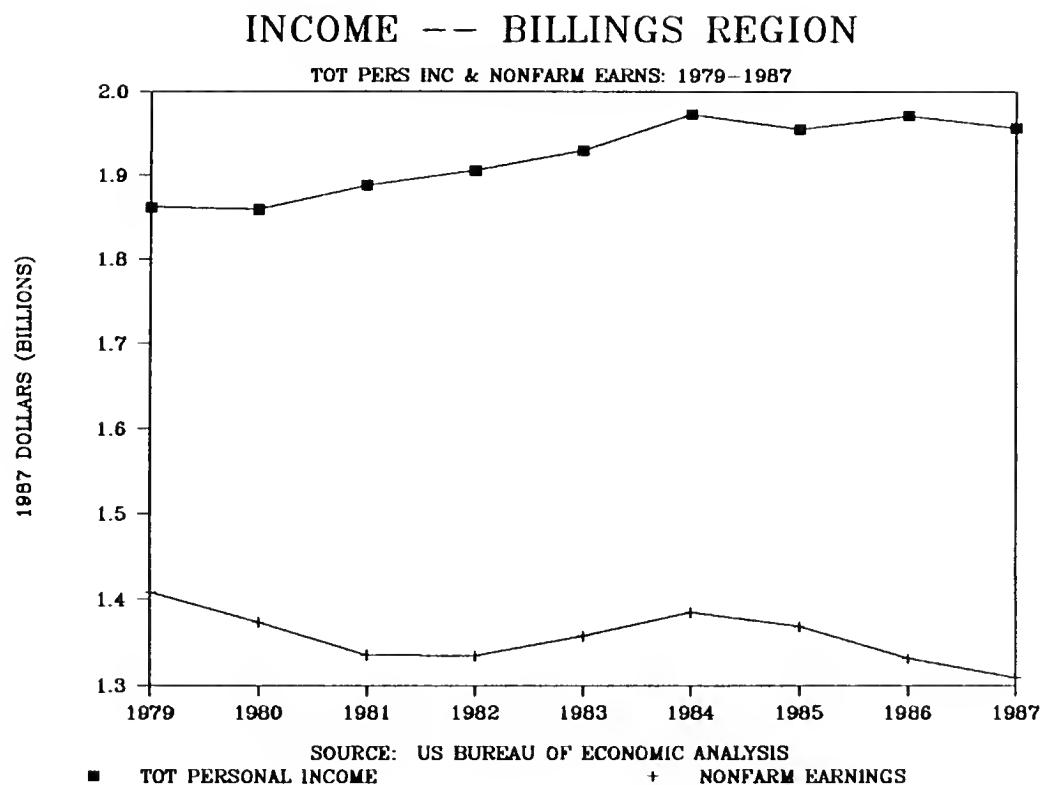


Figure 2.17



## The Bozeman Region

The Bozeman Region is made up of Gallatin, Meagher, and Park counties in southwest Montana.

### Labor Force

In 1986 the Bozeman Region had more than 33,000 total jobs, which ranked sixth in the regions. Jobs were located predominantly in Gallatin County, one of Montana's largest employing counties (Table 2.20).

Between 1969 and 1986, the Bozeman Region experienced an 87 percent increase in jobs--the largest percentage growth of all regions. In the period between 1979 and 1986, the region's growth also ranked first with a 15.6 percent increase, while jobs in Montana grew by 3.4 percent. The region suffered only two years of decline in the total number of jobs--1975 and 1980--when the state and the nation experienced either economic slowdowns or recessions (Figure 2.18). Wage/salary jobs followed this same pattern until 1986 when a decline was offset by growth in the number of self-employed, thus maintaining growth in the total number of jobs. Decline in wage/salary jobs continued between 1986 and 1987.

Increases in the number of self-employed in the Bozeman Region from 1979 until 1986 played a key role in the region's continued growth. As Table 2.5 shows, the self-employed growth rate was 40 percent (third highest among regions), while wage/salary jobs grew by 9 percent (first among regions). Comparatively, the statewide self-employed growth rate was 30 percent and the wage/salary growth rate was minus 4 percent.

Three sectors dominate Bozeman Region jobs: retail trade, services, and government. Retail trade and government are somewhat more important to the region than the average statewide, in part reflecting the influence of Montana State University on the region's economy. Within these sectors, key industries include eating/drinking places, health services, hotels/other lodging places, and state/local government.

The vitality of the lodging sector and eating/drinking establishments indicates the importance of the travel industry in this region. Major attractions include Yellowstone National Park, ski resorts, and events at Montana State University.

During the 1970s, every sector in the region experienced significant job growth except for agriculture, which declined regionally and statewide. But between 1979 and 1987, growth and decline were divided more evenly in the region. Eating/drinking places, business/lodging/health services, and wholesale trade provided most of the jobs increase, while manufacturing, transportation and public utilities, and construction all experienced a loss in wage/salary jobs. Specific industries experiencing large declines in recent years include building construction, lumber/wood products, electrical/electronic equipment, and railroad transportation (closure of the Livingston locomotive repair facility, which reopened at a lower employment

level in 1988).

Table 2.21 shows the decline in these sectors between 1986 and 1987. Wage/salary jobs declined by 1.2 percent during this period, for a loss of 250 jobs, despite strong performance by private business services. Because the numbers used are yearly averages, however, declines in 1986 obscure the gradual recovery that began in 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs actually declined by less than 20 jobs.

The Bozeman Region had the lowest unemployment rate (6.3 percent) in 1987 of all regions. The state's rate was markedly higher at 7.4 percent. Historically, the region's performance has been much better than the state, with the unemployment rate remaining far below the state average for all years except 1975 and 1980, two periods of recession in most regions of Montana (Figure 2.20).

### Population

Based on 1987 data, the Bozeman Region ranked sixth in population, with an estimated 63,000, most being residents of Gallatin County. Population growth in this region is notable. Historically, population growth was strong in every decade except the 1920s, with the rate of increase generally becoming larger with each decade (Table 2.8). From 1969 until 1986, population in the region increased in every year, resulting in a 41 percent increase over the entire period (Figure 2.19). Population in 1987, however, declined slightly, reflecting a statewide trend. Between 1979 and 1987, when the state population grew by only 2.5 percent, population in the region grew by 10.1 percent, making it one of the fastest growing regions in the state for this period.

### Income

With the exception of property income, 1986 rankings for total personal income and its components were slightly lower than the rankings for population and jobs in the Bozeman Region (Table 2.20). Total personal income ranked seventh, with most of this income located in Gallatin County.

Like other high growth regions, the Bozeman Region experienced above average growth in income between 1979 and 1987. While total personal income for the state grew by only 3 percent, growth in the Bozeman Region was the highest in the state at 14 percent. Table 2.10 shows that this high growth dates back to the 1970s. A comparison of Figure 2.21 (for the Bozeman Region) and Figure 2.11 (for the state) illustrates this growth. After declining slightly in 1980, total personal income increased steadily through 1986 before declining again in 1987.

Steady growth in property income and transfer payments has supported the growth of total personal income, but unlike several other regions (and to some extent the state), these components have not been the only source of growth for personal income during the state's recessions. Growth in nonfarm

earnings, contrary to the statewide trend, contributed much to the growth of total personal income during the 1980s. The period between 1980 and 1985 was one of continued growth in nonfarm earnings in the region, while the state experienced a net decline in this income component. In 1986 and 1987, however, the region's exceptional performance came to an end, and nonfarm earnings followed the statewide trend and declined slightly in both years.

Although the region ranked seventh in 1986 in farm earnings, Gallatin County ranked second. The region's pattern of farm earnings generally was much closer to that of the state between 1979 and 1987. After a slight decline between 1979 and 1981, farm earnings in the region reached a low in 1982 and remained there through 1985. Like the state, the region experienced renewed growth in farm earnings in 1986, which contributed to total personal income growth despite a decline in nonfarm earnings. In 1987, farm earnings were comparable to the 1986 level, and the decline in nonfarm earnings affected total personal income.

Growth in per capita personal income in the region has been modest (Table 2.20), with the average for 1982-1986 ranking the region seventh of the 12 regions. Park County, ranking 16th among counties, consistently had the highest per capita income, followed by Gallatin and Meagher counties. Per capita income in the region as well as in Gallatin and Meagher counties historically has remained slightly below the state average, while in recent years per capita income in Park County has been slightly higher than the Montana average (Table 2.15).

With strong growth in population and total personal income in recent years (Figure 2.19 and Table 2.20), two opposing factors influenced the growth of per capita income: higher population meant lower per capita income and higher total income meant higher per capita income. Between 1982 and 1987, growth in total personal income (aided by the decline in population in 1987) was the stronger factor, and per capita income increased during every year except 1985 when the Montana recession slowed income growth.

Figure 2.18

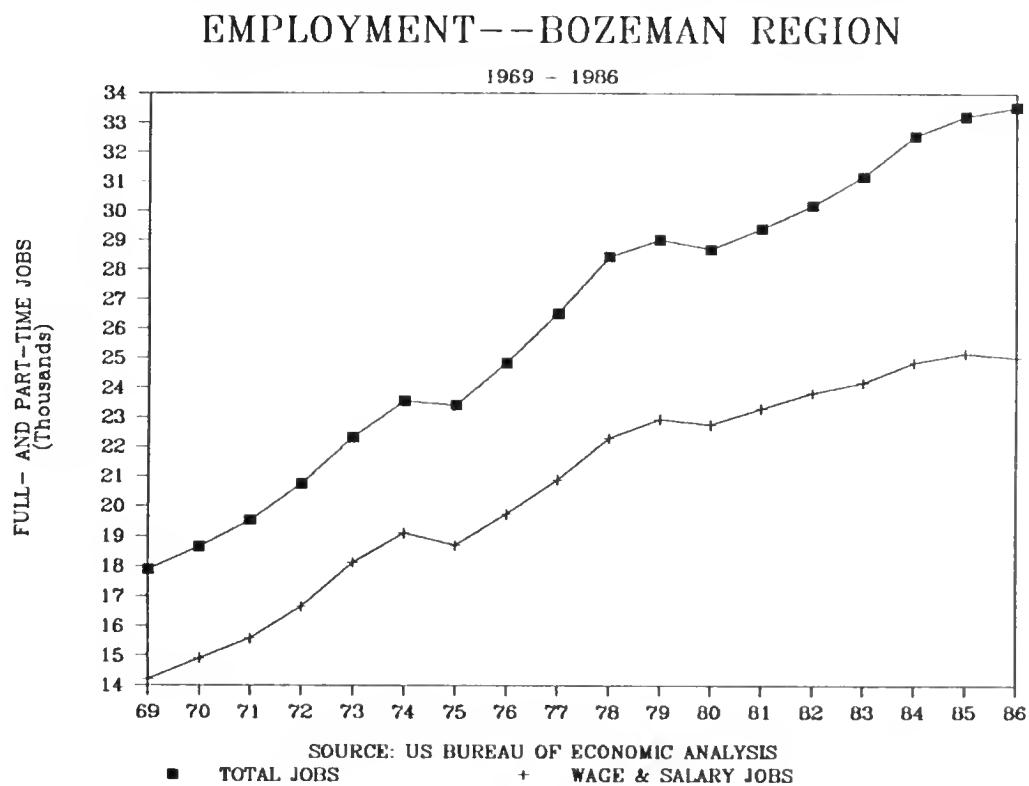


Figure 2.19

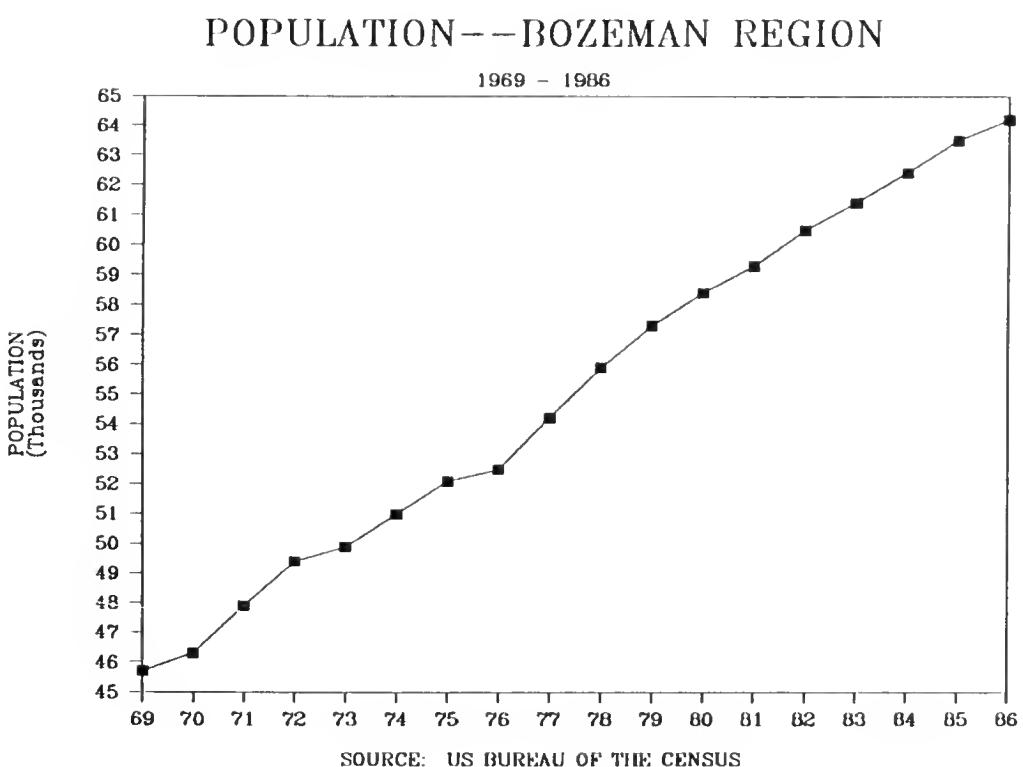


Table 2.20

|                                           | The Bozeman Region |         |         |         |         |         |         |         |         |         |         | Rank in State /d   |
|-------------------------------------------|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|
|                                           | 1959               | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987 /p | (Region or County) |
| <b>Population /a</b>                      |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 41,500             | 45,700  | 57,300  | 58,400  | 59,300  | 60,500  | 61,400  | 62,400  | 63,500  | 64,200  | 63,100  | 6                  |
| Gallatin                                  | 25,800             | 32,000  | 42,000  | 43,100  | 43,700  | 45,000  | 45,600  | 46,800  | 47,800  | 49,100  | 48,700  | 5                  |
| Meagher                                   | 2,600              | 2,200   | 2,300   | 2,200   | 2,200   | 2,300   | 2,300   | 2,200   | 2,200   | 2,100   | 2,100   | 49                 |
| Park                                      | 13,100             | 11,500  | 13,000  | 13,100  | 13,400  | 13,300  | 13,500  | 13,400  | 13,500  | 13,000  | 12,300  | 14                 |
| <b>Total Jobs /b</b>                      |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...                | 17,894  | 29,023  | 28,699  | 29,420  | 30,203  | 31,194  | 32,577  | 33,233  | 33,542  | ...     | 5                  |
| Gallatin                                  | ...                | 12,508  | 21,498  | 21,485  | 22,318  | 23,229  | 24,240  | 25,377  | 25,917  | 26,180  | ...     | 6                  |
| Meagher                                   | ...                | 916     | 1,027   | 995     | 959     | 955     | 977     | 960     | 1,006   | 1,021   | ...     | 49                 |
| Park                                      | ...                | 4,470   | 6,498   | 6,219   | 6,143   | 6,019   | 5,977   | 6,240   | 6,310   | 6,341   | ...     | 13                 |
| <b>Wage &amp; Salary Jobs /b</b>          |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...                | 14,202  | 22,932  | 22,752  | 23,301  | 23,817  | 24,169  | 24,855  | 25,153  | 25,022  | ...     | 6                  |
| Gallatin                                  | ...                | 10,240  | 17,213  | 17,290  | 17,955  | 18,650  | 19,204  | 19,784  | 20,050  | 19,977  | ...     | 6                  |
| Meagher                                   | ...                | 632     | 707     | 685     | 668     | 656     | 657     | 620     | 657     | 661     | ...     | 47                 |
| Park                                      | ...                | 3,330   | 5,012   | 4,777   | 4,678   | 4,511   | 4,308   | 4,451   | 4,446   | 4,384   | ...     | 14                 |
| <b>Unemployment Rate /c</b>               |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...                | 3.3%    | 4.6%    | 6.3%    | 6.1%    | 7.3%    | 7.4%    | 5.6%    | 5.7%    | 6.6%    | 6.3%    | 1                  |
| Gallatin                                  | ...                | 2.7%    | 4.5%    | 6.2%    | 5.5%    | 6.3%    | 6.4%    | 4.8%    | 5.0%    | 6.0%    | 5.7%    | 18                 |
| Meagher                                   | ...                | 3.8%    | 3.9%    | 5.4%    | 6.5%    | 9.2%    | 11.7%   | 13.1%   | 8.9%    | 8.6%    | 8.4%    | 37                 |
| Park                                      | ...                | 4.6%    | 5.3%    | 7.1%    | 8.3%    | 10.8%   | 10.6%   | 7.5%    | 7.8%    | 9.0%    | 8.6%    | 38                 |
| <b>Total Personal Income (\$1000s) /b</b> |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 286,130            | 361,540 | 665,698 | 659,600 | 679,128 | 681,681 | 704,058 | 733,860 | 742,162 | 759,885 | 752,000 | 7                  |
| Gallatin                                  | 179,664            | 248,202 | 474,198 | 478,270 | 492,505 | 500,563 | 523,057 | 550,263 | 559,436 | 566,663 | ...     | 6                  |
| Meagher                                   | 19,053             | 18,517  | 27,007  | 23,805  | 24,870  | 23,507  | 22,793  | 21,351  | 19,261  | 25,044  | ...     | 49                 |
| Park                                      | 87,413             | 94,822  | 164,493 | 157,525 | 161,752 | 157,611 | 157,587 | 162,247 | 163,406 | 168,178 | ...     | 13                 |
| <b>Per Capita Personal Income /b</b>      |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 6,895              | 7,928   | 11,623  | 11,318  | 11,449  | 11,254  | 11,458  | 11,752  | 11,702  | 11,840  | 11,900  | 7                  |
| Gallatin                                  | 6,964              | 7,762   | 11,288  | 11,107  | 11,259  | 11,115  | 11,478  | 11,768  | 11,715  | 11,552  | ...     | 23                 |
| Meagher                                   | 7,328              | 8,528   | 11,742  | 11,016  | 11,377  | 10,517  | 9,816   | 9,531   | 8,934   | 11,819  | ...     | 41                 |
| Park                                      | 6,673              | 8,280   | 12,687  | 12,063  | 12,083  | 11,851  | 11,670  | 12,066  | 12,096  | 12,930  | ...     | 16                 |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 179,376            | 243,247 | 451,499 | 432,038 | 432,941 | 440,950 | 449,455 | 475,158 | 478,826 | 473,267 | 463,000 | 7                  |
| Gallatin                                  | 116,744            | 177,580 | 332,027 | 319,487 | 323,066 | 336,861 | 346,553 | 367,657 | 374,793 | 369,622 | ...     | 8                  |
| Meagher                                   | 9,760              | 8,429   | 11,420  | 10,382  | 9,891   | 9,475   | 9,886   | 9,447   | 9,445   | 9,336   | ...     | 48                 |
| Park                                      | 52,872             | 57,238  | 108,053 | 102,168 | 99,985  | 94,614  | 93,016  | 98,054  | 94,587  | 94,309  | ...     | 14                 |
| <b>Farm Earnings (\$1000s) /b</b>         |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 32,916             | 29,487  | 29,922  | 29,856  | 25,717  | 10,827  | 12,019  | 15,821  | 12,754  | 31,548  | 33,000  | 7                  |
| Gallatin                                  | 18,010             | 12,617  | 12,897  | 19,005  | 15,146  | 6,947   | 8,860   | 12,642  | 12,258  | 20,939  | ...     | 2                  |
| Meagher                                   | 4,044              | 5,445   | 7,978   | 5,314   | 5,697   | 3,125   | 1,821   | 1,503   | (391)   | 5,377   | ...     | 34                 |
| Park                                      | 10,862             | 11,425  | 9,047   | 5,536   | 4,873   | 755     | 1,338   | 1,676   | 887     | 5,232   | ...     | 35                 |
| <b>Property Income (\$1000s) /b</b>       |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 53,435             | 63,368  | 122,836 | 128,053 | 145,942 | 149,492 | 156,806 | 160,926 | 165,089 | 165,261 | 167,000 | 5                  |
| Gallatin                                  | 33,501             | 42,956  | 85,909  | 90,625  | 104,797 | 105,007 | 112,424 | 116,410 | 116,692 | 116,979 | ...     | 5                  |
| Meagher                                   | 3,970              | 3,378   | 4,800   | 5,084   | 5,686   | 6,749   | 6,589   | 6,444   | 6,534   | 6,507   | ...     | 49                 |
| Park                                      | 15,964             | 17,254  | 32,127  | 32,346  | 35,458  | 37,736  | 37,792  | 38,072  | 41,862  | 41,775  | ...     | 12                 |
| <b>Transfer Payments (\$1000s) /b</b>     |                    |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 25,424             | 39,100  | 84,442  | 91,480  | 98,711  | 105,796 | 112,488 | 113,095 | 119,087 | 124,239 | 125,000 | 7                  |
| Gallatin                                  | 15,209             | 25,424  | 59,791  | 65,341  | 67,948  | 71,478  | 76,539  | 76,904  | 81,156  | 84,813  | ...     | 7                  |
| Meagher                                   | 1,698              | 2,081   | 3,530   | 3,655   | 4,295   | 4,920   | 5,317   | 4,784   | 4,646   | 4,835   | ...     | 46                 |
| Park                                      | 8,517              | 11,594  | 21,120  | 22,483  | 26,468  | 29,398  | 30,653  | 31,406  | 33,284  | 34,591  | ...     | 13                 |

/a U.S. Bureau of the Census /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.21

## WAGE &amp; SALARY EMPLOYMENT IN THE BOZEMAN REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE  | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|---------|-------------------|
| Total Wage and Salary Employment                    |               | 20,477  | 20,227  | (250)   | -1.2%             |
| Total Private                                       |               | 15,269  | 15,088  | (181)   | -1.2%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 288         | E 283   | E (5)   | E -1.7% |                   |
| Agricultural Production--Crops ***                  | 01            | 39      | 21      | (18)    | -46.2%            |
| Agricultural Production--Livestock ***              | 02            | 166     | 182     | 16      | 9.6%              |
| Agricultural Services                               | 07            | 83      | 80      | (3)     | -3.6%             |
| Forestry<br>Fishing, Hunting, and Trapping          | 08            | "0"     | "0"     | "0"     | "0"               |
| 09                                                  |               |         |         |         |                   |
| Mining                                              |               | 227     | 154     | (73)    | -32.2%            |
| Metal Mining                                        | 10            | 83      | 13      | (70)    | -84.3%            |
| Coal Mining                                         | 12            |         |         |         |                   |
| Oil and Gas Extraction                              | 13            | 14      | 1       | (13)    | -92.9%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 129     | 138     | 9       | 7.0%              |
| Construction                                        |               | 887     | 728     | (159)   | -17.9%            |
| General Building Contractors                        | 15            | 438     | 331     | (107)   | -24.4%            |
| Heavy Construction Contractors                      | 16            | 55      | 37      | (18)    | -32.7%            |
| Special Trade Contractors                           | 17            | 392     | 356     | (36)    | -9.2%             |
| Manufacturing                                       |               | 1,430   | 1,370   | (60)    | -4.2%             |
| Food and Kindred Products                           | 20            | 221     | 200     | (21)    | -9.5%             |
| Textile Mill Products                               | 22            |         |         |         |                   |
| Apparel and Other Textile Products                  | 23            | 15      | 23      | 8       | 53.3%             |
| Lumber and Wood Products                            | 24            | 474     | 452     | (22)    | -4.6%             |
| Furniture and Fixtures                              | 25            | "0"     | "0"     | "0"     | "0"               |
| Paper and Allied Products                           | 26            | "0"     | "0"     | "0"     | "0"               |
| Printing and Publishing                             | 27            | 228     | 234     | 6       | 2.6%              |
| Chemicals and Allied Products                       | 28            | "0"     | "0"     | "0"     | "0"               |
| Petroleum Refining and Related Industries           | 29            |         |         |         |                   |
| Rubber and Miscellaneous Plastic Products           | 30            | "0"     | 53      | "0"     | "0"               |
| Leather and Leather Products                        | 31            | 24      | 3       | (21)    | -87.5%            |
| Stone, Clay, Glass, and Concrete Products           | 32            | 169     | 155     | (14)    | -8.3%             |
| Primary Metals Processing                           | 33            | 13      | 14      | 1       | 7.7%              |
| Fabricated Metal Products                           | 34            | 49      | 47      | (2)     | -4.1%             |
| Machinery, Except Electrical                        | 35            | 8       | "0"     | "0"     | "0"               |
| Electrical and Electronic Equipment                 | 36            | 53      | 49      | (4)     | -7.5%             |
| Transportation Equipment                            | 37            | 3       | "0"     | "0"     | "0"               |
| Instruments and Related Products                    | 38            | "0"     | 21      | "0"     | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | 77      | 58      | (19)    | -24.7%            |
| Transportation and Public Utilities                 |               | 900     | 904     | 4       | 0.4%              |
| Local and Interurban Passenger Transit              | 41            | 115     | 116     | 1       | 0.9%              |
| Trucking and Warehousing                            | 42            | 322     | 323     | 1       | 0.3%              |
| Water Transportation                                | 44            |         |         |         |                   |
| Transportation by Air                               | 45            | 51      | 72      | 21      | 41.2%             |
| Pipelines, Except Natural Gas                       | 46            |         |         |         |                   |
| Transportation Services                             | 47            | 40      | 44      | 4       | 10.0%             |
| Communications                                      | 48            | 188     | 170     | (18)    | -9.6%             |
| Electric, Gas, and Sanitary Services                | 49            | 181     | 174     | (7)     | -3.9%             |
| Wholesale Trade                                     |               | 817     | 830     | 13      | 1.6%              |
| Durable Goods                                       | 50            | 491     | 488     | (3)     | -0.6%             |
| Non-durable Goods                                   | 51            | 326     | 342     | 16      | 4.9%              |
| Retail Trade                                        |               | 5,169   | 5,136   | (33)    | -0.6%             |
| Building Materials and Hardware                     | 52            | 270     | 242     | (28)    | -10.4%            |
| General Merchandise Stores                          | 53            | 419     | 454     | 35      | 8.4%              |
| Food Stores                                         | 54            | 593     | 605     | 12      | 2.0%              |
| Automotive Dealers and Service Stations             | 55            | 621     | 599     | (22)    | -3.5%             |
| Apparel and Accessory Stores                        | 56            | 205     | 201     | (4)     | -2.0%             |
| Furniture and Home Furnishings Stores               | 57            | 205     | 189     | (16)    | -7.8%             |
| Eating and Drinking Places                          | 58            | 2,241   | 2,201   | (40)    | -1.8%             |
| Miscellaneous Retail                                | 59            | 606     | 639     | 33      | 5.4%              |
| Finance, Insurance, and Real Estate                 |               | 950     | 953     | 3       | 0.3%              |
| Banking                                             | 60            | 428     | 409     | (19)    | -4.4%             |
| Credit Agencies other than Banks                    | 61            | 96      | 94      | (2)     | -2.1%             |
| Security, Commodity Brokers, and Services           | 62            | 33      | 27      | (6)     | -18.2%            |
| Insurance Carriers                                  | 63            | 73      | 60      | (13)    | -17.8%            |
| Real Estate                                         | 64            | 107     | 115     | 8       | 7.5%              |
| Combined Real Estate, Insurance, Etc.               | 65            | 196     | 230     | 34      | 17.3%             |
| Holding and Other Investment Offices                | 66            |         |         |         |                   |
| 67                                                  | 11            | 13      | 2       | 18.2%   |                   |
| Services                                            |               | E 4,556 | E 4,684 | E 128   | E 2.8%            |
| Hotels and Other Lodging Places                     | 70            | 1,254   | 1,201   | (53)    | -4.2%             |
| Personal Services                                   | 72            | 214     | 212     | (2)     | -0.9%             |
| Business Services                                   | 73            | 457     | 603     | 146     | 31.9%             |
| Auto Repair, Services, and Garages                  | 75            | 169     | 160     | (9)     | -5.3%             |
| Miscellaneous Repair Services                       | 76            | 68      | 75      | 7       | 10.3%             |
| Motion Pictures                                     | 78            | 81      | 78      | (3)     | -3.7%             |
| Amusement and Recreation Services                   | 79            | 288     | 302     | 14      | 4.9%              |
| Private Health Services                             | 80            | 1,287   | 1,332   | 45      | 3.5%              |
| Legal Services                                      | 81            | 144     | 148     | 4       | 2.8%              |
| Private Educational Services                        | 82            | 57      | 50      | (7)     | -12.3%            |
| Private Social Services                             | 83            | 216     | 247     | 31      | 14.4%             |
| Museums, Art Galleries, Etc.                        | 84            | "0"     | "0"     | "0"     | "0"               |
| Membership Organizations Including Tribal Gov't     | 86            | 107     | 101     | (6)     | -5.6%             |
| Private Households                                  | 88            | 23      | 30      | 7       | 30.4%             |
| Engineering, Accounting, and Other Services         | 89            | 191     | 145     | (46)    | -24.1%            |
| Non-Classifiable                                    | 99            | 3       | 3       | 0       | 0.0%              |
| Government                                          |               | 5,206   | 5,139   | (67)    | -1.3%             |
| State                                               |               | 2,512   | 2,446   | (66)    | -2.6%             |
| Local                                               |               | 2,084   | 2,055   | (29)    | -1.4%             |
| Federal                                             |               | 607     | 636     | 29      | 4.8%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.20

## UNEMPLOYMENT RATE -- BOZEMAN REGION

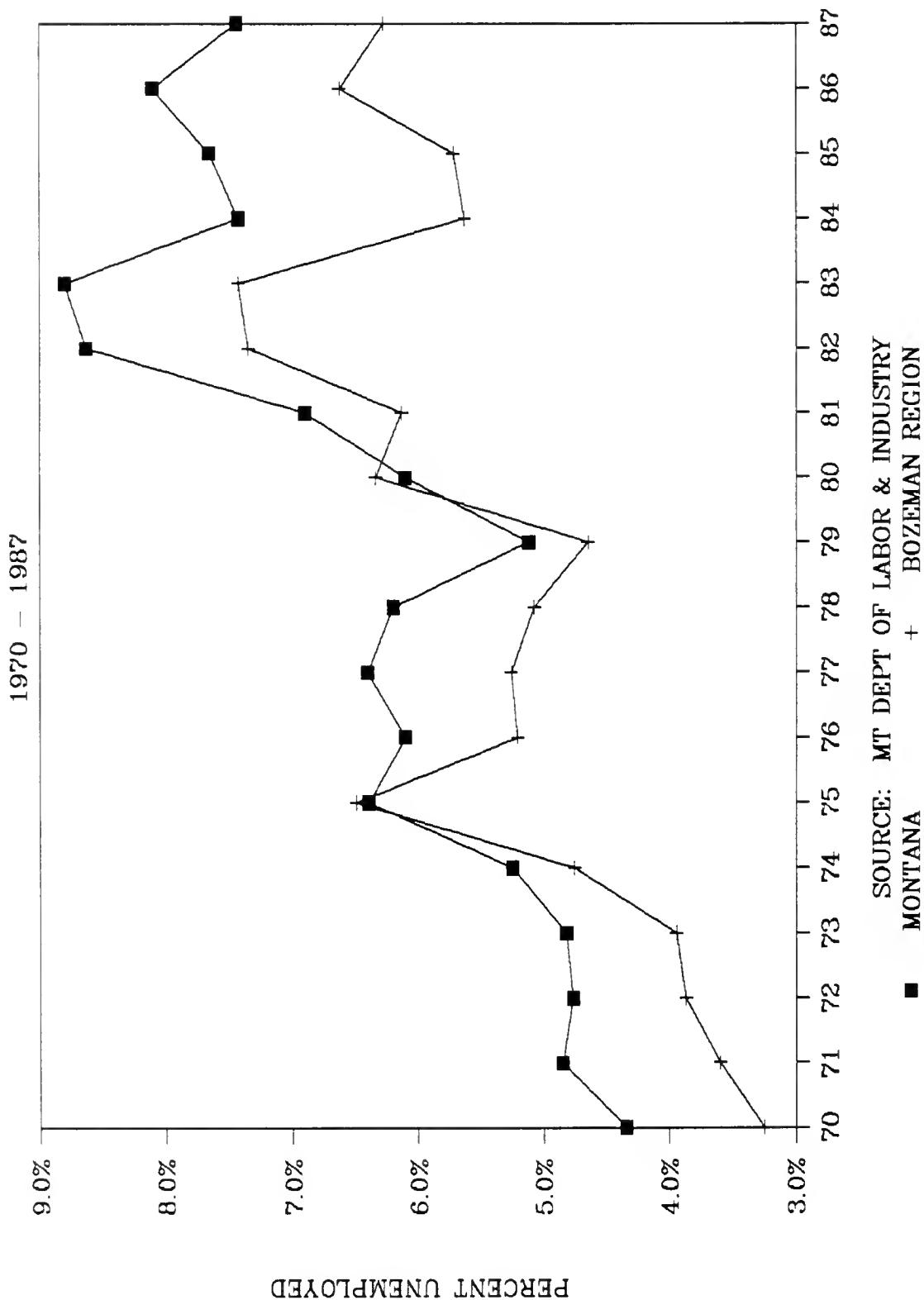
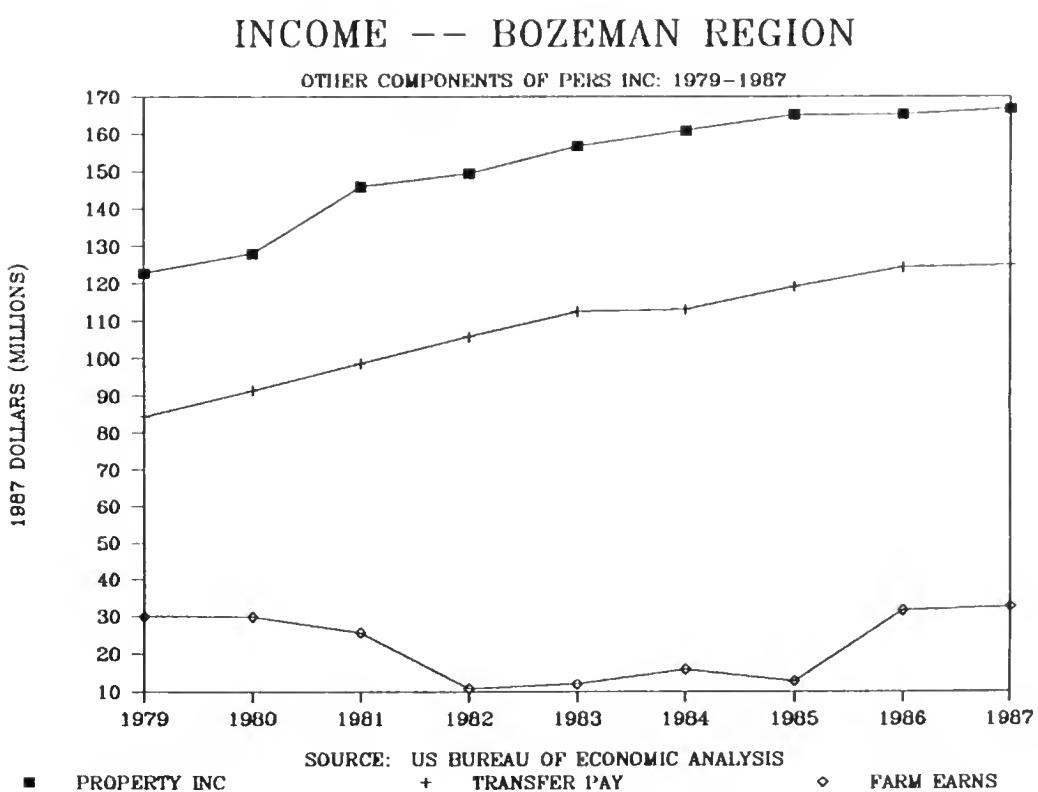
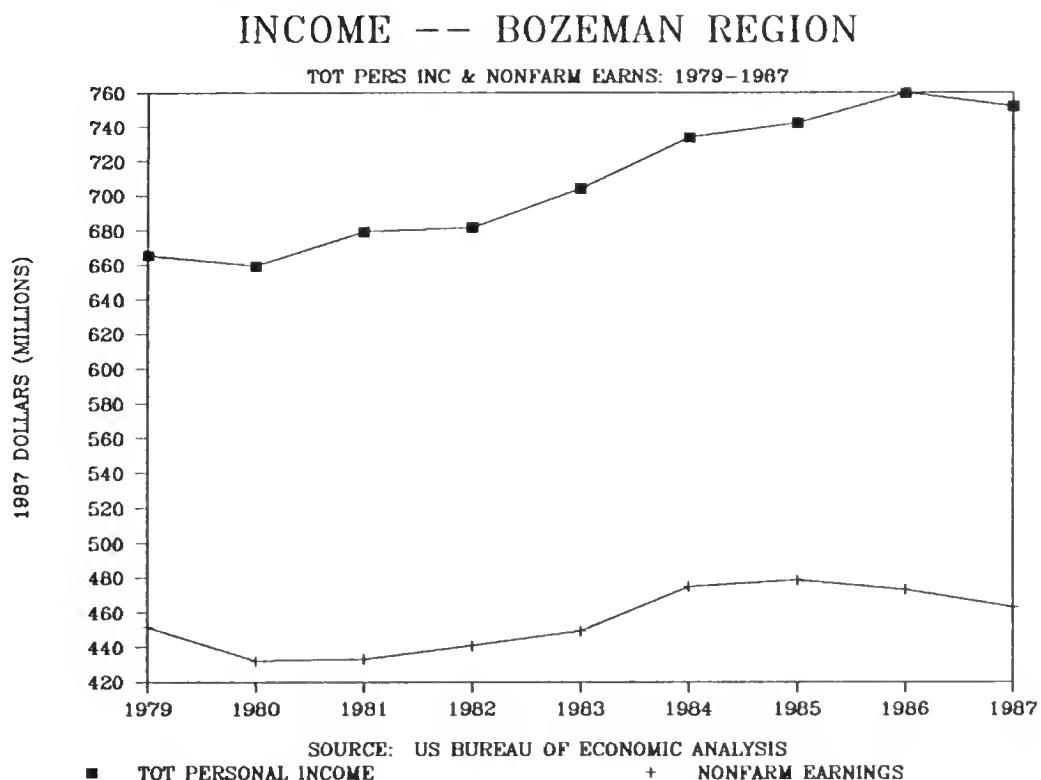


Figure 2.21



## The Butte Region

The Butte Region of southwest Montana includes Beaverhead, Deer Lodge, Granite, Madison, Powell, and Silver Bow counties.

### Labor Force

A marked decline in the total number of jobs characterized the Butte Region from 1974 to 1985. With approximately 30,600 total jobs and 23,500 wage/salary jobs in 1986, the region ranked seventh in both categories. About half the jobs were located in the region's most populous county, Silver Bow, and the other half were distributed fairly evenly among the other five counties (Table 2.22).

Employment in the region has been unstable since 1969, primarily because of volatility in metal mining and related industries. After peaking in 1974, both total jobs and wage/salary jobs declined with few respite (1978, 1979, and 1981) until 1984-1985. By 1986, however, both total jobs and wage/salary jobs had begun to recover slightly. Recovery continued for wage/salary jobs into 1987 with an increase of 1.9 percent, or 370 jobs, for the region (Table 2.22).

Wage/salary jobs declined by 13 percent between 1979 and 1986, the third largest percentage decline in the state (Table 2.5). A 23 percent increase (less than the state's average of 30 percent) in the number of self-employed softened the impact of the region's dramatic wage/salary job loss, but was insufficient to offset a decline in the total number of jobs, which decreased by 7 percent between 1979 and 1986.

The region's significant industries have changed over time, with the exception of government, which always has provided a considerable share of total jobs. In 1969, mining and manufacturing together accounted for nearly 25 percent of wage/salary employment in the region. By 1986, this share decreased to less than 10 percent, largely a result of the decrease in employment and subsequent closure of the Anaconda Company's metal mining and processing facilities. Industries that expanded to fill this gap included retail trade and services, growing from a combined share of 30 percent to 41 percent of the wage/salary employment between 1969 and 1986.

Within retail trade and services, growth occurred in areas such as private health and social services, business services, hotels/motels, and eating/drinking places. During 1987, strong growth in metal mining, retail trade (particularly eating/drinking places), and private services offset declines in construction, local government, and wholesale trade. As a result, wage/salary jobs increased by 1.9 percent, a rate significantly greater than the statewide average of 0.2 percent (Table 2.23).

In the mid-1970s, the closing of the underground metal mining operations raised the unemployment rate of the Butte Region to a level above the statewide average that has persisted to the present (Figure 2.24). Trends in the statewide unemployment rate appeared with regularity in the unemployment

rate of the Butte Region, though often in exaggerated form. In 1987, the regional unemployment rate ranked 10th in the state, and in previous years the ranking was lower (i.e. 11th or even last). In 1983, the region's unemployment rate peaked at 11.8 percent, the worst in the state, with Deer Lodge and Silver Bow counties exhibiting very high rates of 17.1 and 13.5 percent. By 1987, however, the regional rate of 8.3 percent was closer to the statewide average of 7.4 percent.

### Population

Historically, the Butte Region had been the most populous region in the state (Table 2.8). By 1950, however, the region's population began to decline, and in 1987, ranked fifth. Since peaking in 1920, population has declined in almost every decade, with the only exception occurring during the strong statewide growth of the 1950s.

As with unemployment, 1975 represents a turning point in the region's population. Figure 2.23 illustrates the region's population gradually creeping upward until 1975, and then falling off abruptly and declining steadily ever since. In terms of population growth, the region ranks last, whether growth is measured between 1969 and 1987 (a decline of 17 percent) or between 1979 and 1987 (a decline of 11 percent). Instability in the job market reflected by high unemployment rates and a declining trend in both total and wage/salary jobs has contributed a great deal to the region's loss of population (Figures 2.22 and 2.24). If the turnaround in jobs since 1984-1985 continues, however, confidence in the region's job market will return, and renewed growth in population may follow.

### Income

The Butte Region ranked fifth in total personal income in 1986, reflecting similar ranking for its components, and close to the rankings for population and total jobs (Table 2.22). Just over half of this income was located in Silver Bow County.

Changes in total personal income and its components were influenced strongly by the declines in total and wage/salary jobs that occurred between 1979 and 1987. Therefore, the pattern of change for total personal income in Figure 2.25 is noticeably different from that for the state, shown in Figure 2.11. Between 1979 and 1986, total personal income declined by 7 percent in the Butte Region, the largest decline in the state. However, the decline was not uniform throughout the region, as Table 2.22 shows, and both Beaverhead and Powell counties experienced increases in personal income. Also of note is the fact that income basically has increased since 1985.

The decline in total personal income primarily was due to a general decline in nonfarm earnings (Figure 2.25). This decline closely followed the decline in wage/salary jobs that occurred after 1979 (Figure 2.22). In addition, the recovery in wage/salary jobs that occurred in 1986 and 1987 was paralleled by slight growth in nonfarm earnings in these same years.

Total growth in transfer payments and property income in the region was similar to that of the state, except for a slight decline in property income that occurred between 1984 and 1987. More interesting, however, is the relative size of transfer payments and property income. Unlike the statewide experience, the transfer payments component of personal income in the Butte Region was consistently larger than the property income component between 1979 and 1987. Table 2.22 reveals that this switchover occurred sometime during the 1970s.

Regional farm earnings ranked ninth in the state in 1986, reflecting the urban nature of Silver Bow County (which ranked last in farm earnings) and the generally mountainous terrain of the region. Growth of regional farm earnings was similar to growth statewide, with very poor performance between 1981 and 1985. Recovery in 1986 provided a welcome boost to total personal income, and farm earnings remained basically unchanged during 1987.

The Butte Region ranked fifth in per capita income for the 1982-1986 period, supported by strong performance in Silver Bow County, which ranked fifth among Montana's counties. Compared to the state average, per capita income in the region has been slightly lower than average since 1979.

Between 1979 and 1985, changes in per capita income closely followed changes in total personal income. In 1986 and 1987, however, declines in population accompanied by a large increase in the farm earnings component of personal income created a surge in per capita income for both the region and the state (Tables 2.15 and 2.22).

Figure 2.22

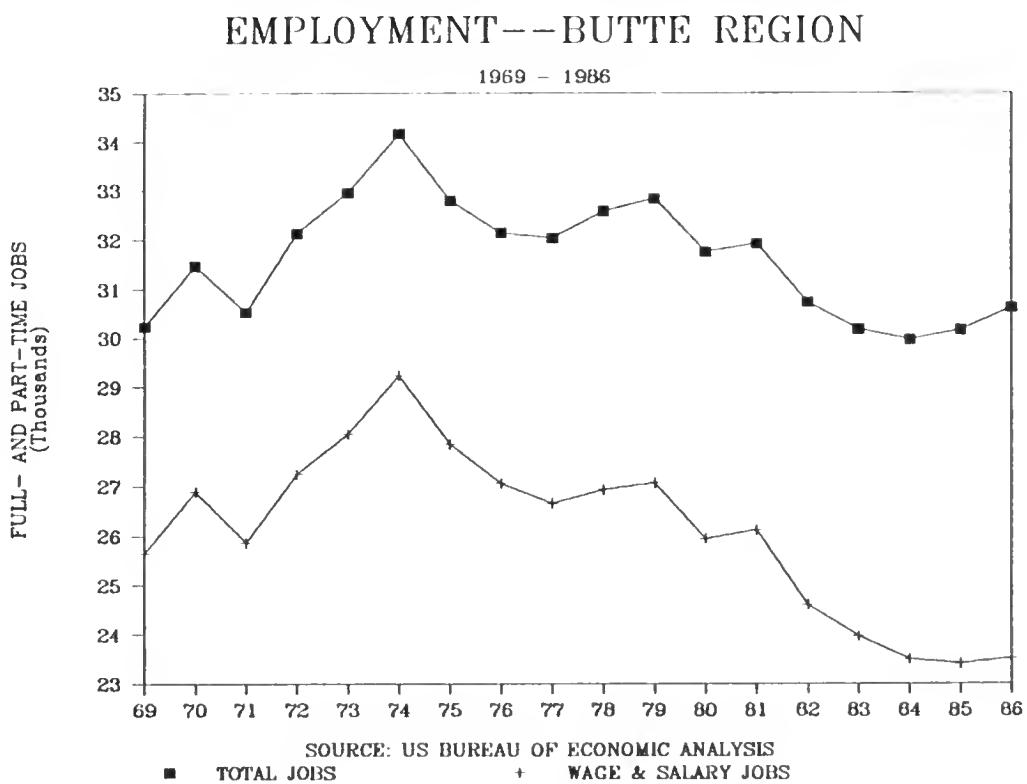


Figure 2.23

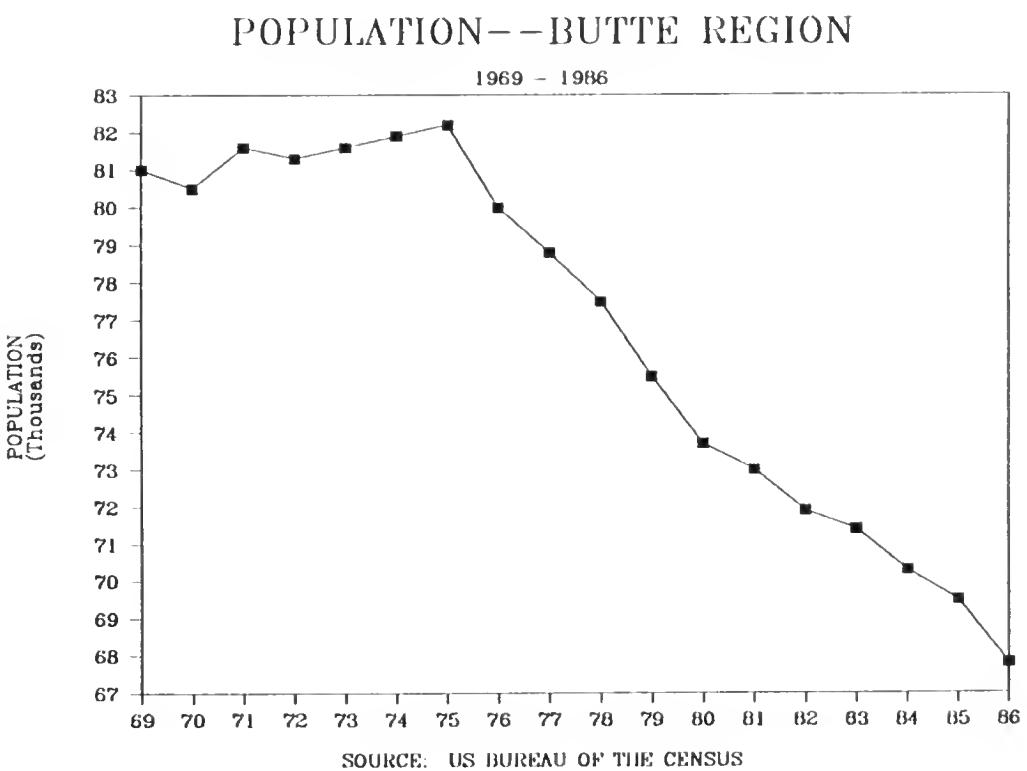


Table 2.22

|                                    | The Butte Region |         |         |         |         |         |         |         |         |         |         | Rank in State /d   |
|------------------------------------|------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|
|                                    | 1959             | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987 /p | (Region or County) |
| Population /a                      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 86,800           | 81,000  | 75,500  | 73,700  | 73,000  | 71,900  | 71,400  | 70,300  | 69,500  | 67,800  | 67,200  | 5                  |
| Beaverhead                         | 7,100            | 8,160   | 7,900   | 8,200   | 8,300   | 8,300   | 8,700   | 8,500   | 8,500   | 8,400   | 8,400   | 23                 |
| Deer Lodge                         | 18,500           | 15,900  | 12,900  | 12,400  | 12,000  | 11,600  | 11,400  | 11,200  | 11,000  | 10,200  | 10,000  | 21                 |
| Granite                            | 3,000            | 2,800   | 2,700   | 2,700   | 2,700   | 2,600   | 2,700   | 2,700   | 2,700   | 2,700   | 2,700   | 42                 |
| Madison                            | 5,200            | 5,000   | 5,500   | 5,500   | 5,700   | 5,800   | 5,800   | 5,900   | 5,800   | 5,700   | 5,700   | 33                 |
| Powell                             | 8,900            | 6,700   | 7,200   | 6,900   | 6,900   | 6,800   | 6,800   | 6,900   | 6,900   | 6,900   | 6,900   | 28                 |
| Silver Bow                         | 46,100           | 42,500  | 39,300  | 38,000  | 37,400  | 36,600  | 36,000  | 35,200  | 34,600  | 33,900  | 33,700  | 7                  |
| Total Jobs /b                      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | ...              | 30,240  | 32,840  | 31,756  | 31,927  | 30,730  | 30,183  | 29,963  | 30,159  | 30,417  | ...     | 7                  |
| Beaverhead                         | ...              | 3,243   | 3,875   | 3,891   | 3,884   | 4,006   | 4,079   | 4,125   | 4,121   | 4,276   | ...     | 22                 |
| Deer Lodge                         | ...              | 5,819   | 4,696   | 4,087   | 3,761   | 3,431   | 3,532   | 3,657   | 3,660   | 3,631   | ...     | 23                 |
| Granite                            | ...              | 1,103   | 1,128   | 1,133   | 1,131   | 1,144   | 1,168   | 1,228   | 1,195   | 1,225   | ...     | 46                 |
| Madison                            | ...              | 2,238   | 2,653   | 2,656   | 2,775   | 2,954   | 2,885   | 2,868   | 2,892   | 3,005   | ...     | 31                 |
| Powell                             | ...              | 2,369   | 3,063   | 2,951   | 2,843   | 2,959   | 3,010   | 3,015   | 3,068   | 3,052   | ...     | 28                 |
| Silver Bow                         | ...              | 15,204  | 17,425  | 17,036  | 17,353  | 16,238  | 15,509  | 15,070  | 15,237  | 15,428  | ...     | 7                  |
| Wage & Salary Jobs /b              |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | ...              | 25,066  | 27,071  | 25,946  | 26,118  | 24,608  | 23,967  | 23,493  | 23,405  | 23,503  | ...     | 7                  |
| Beaverhead                         | ...              | 2,451   | 2,860   | 2,923   | 2,929   | 2,989   | 3,001   | 2,986   | 2,935   | 3,027   | ...     | 21                 |
| Deer Lodge                         | ...              | 5,358   | 4,101   | 3,497   | 3,131   | 2,865   | 2,943   | 3,060   | 3,019   | 2,967   | ...     | 22                 |
| Granite                            | ...              | 756     | 688     | 890     | 845     | 875     | 695     | 744     | 702     | 713     | ...     | 45                 |
| Madison                            | ...              | 1,418   | 1,633   | 1,668   | 1,787   | 1,664   | 1,776   | 1,741   | 1,733   | 1,603   | ...     | 31                 |
| Powell                             | ...              | 2,054   | 2,380   | 2,273   | 2,181   | 2,266   | 2,311   | 2,311   | 2,347   | 2,299   | ...     | 24                 |
| Silver Bow                         | ...              | 13,031  | 15,389  | 14,893  | 15,405  | 13,989  | 15,239  | 12,651  | 12,667  | 12,694  | ...     | 7                  |
| Unemployment Rate /c               |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | ...              | 3.9%    | 5.8%    | 6.7%    | 8.7%    | 10.6%   | 11.8%   | 9.8%    | 8.8%    | 9.0%    | 8.3%    | 10                 |
| Beaverhead                         | ...              | 3.9%    | 3.7%    | 3.8%    | 4.1%    | 6.0%    | 6.5%    | 5.3%    | 6.0%    | 5.8%    | 5.4%    | 13                 |
| Deer Lodge                         | ...              | 2.4%    | 7.0%    | 9.5%    | 17.0%   | 15.18   | 17.1%   | 11.9%   | 10.8%   | 11.0%   | 9.0%    | 47                 |
| Granite                            | ...              | 6.2%    | 7.7%    | 7.7%    | 8.9%    | 11.8%   | 11.0%   | 8.5%    | 13.1%   | 11.0%   | 8.8%    | 39                 |
| Madison                            | ...              | 5.0%    | 3.0%    | 4.6%    | 4.6%    | 7.0%    | 8.6%    | 5.5%    | 4.4%    | 5.7%    | 4.3%    | 21                 |
| Powell                             | ...              | 4.8%    | 5.8%    | 4.3%    | 8.3%    | 10.1%   | 7.9%    | 8.7%    | 8.0%    | 7.6%    | 7.8%    | 36                 |
| Silver Bow                         | ...              | 3.9%    | 4.2%    | 6.88    | 8.38    | 11.38   | 13.5%   | 11.88   | 9.7%    | 10.2%   | 9.2%    | 45                 |
| Total Personal Income (\$1000s) /b |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 625,418          | 874,172 | 889,760 | 845,600 | 874,873 | 840,734 | 834,105 | 812,057 | 802,394 | 827,035 | 824,000 | 5                  |
| Beaverhead                         | 55,466           | 68,433  | 97,287  | 90,198  | 95,090  | 92,930  | 91,438  | 91,142  | 90,081  | 99,231  | ...     | 24                 |
| Deer Lodge                         | 108,911          | 118,465 | 138,262 | 123,430 | 117,894 | 109,470 | 111,153 | 111,672 | 109,931 | 109,938 | ...     | 22                 |
| Granite                            | 21,913           | 20,152  | 31,816  | 29,936  | 29,848  | 27,303  | 29,757  | 29,200  | 28,107  | 29,443  | ...     | 48                 |
| Madison                            | 30,719           | 39,400  | 40,266  | 60,349  | 62,401  | 55,932  | 56,131  | 58,274  | 59,695  | 61,830  | ...     | 35                 |
| Powell                             | 50,253           | 53,667  | 75,713  | 71,809  | 72,628  | 72,421  | 73,259  | 73,479  | 74,741  | 78,518  | ...     | 31                 |
| Silver Bow                         | 358,156          | 374,055 | 480,416 | 469,679 | 491,811 | 482,478 | 471,968 | 448,091 | 439,838 | 446,076 | ...     | 7                  |
| Per Capita Personal Income /b      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 7,205            | 8,317   | 11,771  | 11,664  | 11,978  | 11,692  | 11,662  | 11,561  | 11,528  | 12,199  | 12,340  | 5                  |
| Beaverhead                         | 7,812            | 8,435   | 12,285  | 10,981  | 11,449  | 10,879  | 10,593  | 10,743  | 10,631  | 11,754  | ...     | 33                 |
| Deer Lodge                         | 5,847            | 7,435   | 10,085  | 9,956   | 9,833   | 9,441   | 9,729   | 9,990   | 9,951   | 10,827  | ...     | 44                 |
| Granite                            | 7,304            | 7,281   | 11,705  | 11,067  | 10,982  | 10,319  | 10,900  | 10,773  | 10,269  | 10,909  | ...     | 37                 |
| Madison                            | 5,907            | 7,814   | 11,981  | 10,977  | 10,968  | 9,712   | 9,605   | 9,948   | 10,338  | 11,557  | ...     | 39                 |
| Powell                             | 7,283            | 8,001   | 10,543  | 10,338  | 10,555  | 10,729  | 10,704  | 10,828  | 10,781  | 11,109  | ...     | 35                 |
| Silver Bow                         | 7,769            | 8,802   | 12,225  | 12,567  | 13,270  | 13,184  | 13,101  | 12,728  | 12,697  | 13,152  | ...     | 5                  |
| Nonfarm Earnings (\$1000s) /b      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 450,271          | 484,127 | 590,370 | 566,297 | 553,219 | 517,339 | 509,521 | 481,687 | 476,454 | 478,267 | 479,000 | 6                  |
| Beaverhead                         | 27,278           | 35,457  | 52,652  | 52,020  | 50,090  | 50,906  | 52,954  | 53,469  | 53,330  | 55,092  | ...     | 23                 |
| Deer Lodge                         | 95,556           | 96,104  | 96,673  | 76,970  | 66,319  | 55,901  | 58,449  | 59,202  | 59,716  | 56,689  | ...     | 22                 |
| Granite                            | 12,049           | 11,399  | 11,655  | 11,107  | 11,018  | 10,542  | 12,073  | 13,200  | 11,767  | 11,501  | ...     | 46                 |
| Madison                            | 11,701           | 18,251  | 26,295  | 24,480  | 25,550  | 25,611  | 26,992  | 25,222  | 25,777  | 26,984  | ...     | 35                 |
| Powell                             | 28,362           | 36,007  | 45,274  | 41,579  | 40,403  | 43,618  | 44,356  | 45,431  | 47,136  | 46,347  | ...     | 24                 |
| Silver Bow                         | 274,065          | 286,908 | 357,820 | 340,162 | 359,840 | 330,762 | 315,916 | 285,143 | 278,728 | 283,053 | ...     | 7                  |
| Farm Earnings (\$1000s) /b         |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 37,308           | 31,872  | 40,532  | 26,338  | 26,803  | 10,866  | 6,140   | 7,876   | 6,978   | 25,652  | 25,000  | 9                  |
| Beaverhead                         | 11,926           | 13,469  | 15,581  | 9,169   | 13,799  | 8,946   | 6,550   | 4,229   | 2,808   | 9,630   | ...     | 17                 |
| Deer Lodge                         | 1,273            | 2,078   | 1,927   | 1,788   | 870     | 629     | 526     | 760     | 561     | 1,449   | ...     | 53                 |
| Granite                            | 5,453            | 2,783   | 5,309   | 3,809   | 2,943   | 1,040   | 657     | 857     | 957     | 3,008   | ...     | 49                 |
| Madison                            | 9,101            | 8,960   | 11,771  | 7,848   | 6,026   | 1,604   | 1,050   | 2,289   | 2,936   | 7,805   | ...     | 23                 |
| Powell                             | 8,813            | 3,329   | 5,298   | 3,028   | 2,759   | (926)   | (1,116) | (831)   | (1,023) | 3,089   | ...     | 48                 |
| Silver Bow                         | 764              | 772     | 646     | 700     | (195)   | (305)   | 473     | 552     | 739     | 671     | ...     | 56                 |
| Property Income (\$1000s) /b       |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 86,732           | 95,854  | 134,713 | 139,080 | 155,277 | 166,407 | 161,394 | 166,027 | 161,967 | 160,289 | 154,000 | 6                  |
| Beaverhead                         | 12,438           | 12,752  | 21,269  | 21,053  | 22,364  | 23,753  | 24,171  | 23,333  | 22,468  | 22,405  | ...     | 23                 |
| Deer Lodge                         | 11,025           | 12,318  | 14,393  | 15,833  | 18,178  | 19,372  | 19,145  | 20,933  | 19,489  | 19,519  | ...     | 27                 |
| Granite                            | 2,212            | 2,856   | 5,859   | 3,847   | 6,513   | 7,114   | 7,245   | 8,432   | 7,033   | 7,023   | ...     | 46                 |
| Madison                            | 4,278            | 7,645   | 17,516  | 17,715  | 19,019  | 18,043  | 18,119  | 18,417  | 18,465  | 18,391  | ...     | 28                 |
| Powell                             | 6,063            | 7,220   | 12,868  | 14,329  | 16,479  | 17,060  | 16,506  | 16,369  | 16,071  | 16,022  | ...     | 33                 |
| Silver Bow                         | 48,114           | 52,883  | 62,210  | 64,362  | 72,724  | 81,065  | 76,148  | 80,161  | 78,420  | 76,928  | ...     | 7                  |
| Transfer Payments (\$1000s) /b     |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                             | 66,583           | 92,015  | 162,416 | 169,271 | 178,158 | 184,688 | 194,643 | 193,723 | 196,775 | 204,056 | 205,000 | 5                  |
| Beaverhead                         | 5,039            | 7,604   | 14,204  | 14,897  | 15,190  | 14,226  | 17,346  | 17,463  | 18,798  | 19,933  | ...     | 24                 |
| Deer Lodge                         | 11,125           | 16,334  | 28,643  | 30,604  | 32,765  | 32,711  | 34,314  | 36,166  | 34,703  | 35,587  | ...     | 12                 |
| Granite                            | 1,913            | 2,976   | 3,157   | 3,456   | 5,938   | 6,318   | 4,482   | 4,435   | 4,715   | 4,848   | ...     | 41                 |
| Madison                            | 3,382            | 5,036   | 9,683   | 9,589   | 10,669  | 10,437  | 11,654  | 12,134  | 12,399  | 12,790  | ...     | 33                 |
| Powell                             | 5,475            | 7,476   | 13,458  | 14,151  | 14,685  | 15,871  | 14,159  | 16,005  | 16,355  | 16,772  | ...     | 26                 |
| Silver Bow                         | 39,250           | 52,589  | 91,268  | 94,773  | 98,931  | 102,927 | 108,493 | 107,320 | 107,005 | 112,125 | ...     | 6                  |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1966 data, except Unemployment Rate (1987 date) and Per Capita Income (1982-1986 average).

/p 1967 data consists of preliminary estimates.

Table 2.23

WAGE &amp; SALARY EMPLOYMENT IN THE BUTTE REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 19,818  | 20,185  | 367    | 1.9%              |
| Total Private                                       |               | 14,287  | 14,700  | 413    | 2.9%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 331     | 337     | 6      | 1.8%              |
| Agricultural Production--Crops **                   | 01            | "0"     | 16      | "0"    | "0"               |
| Agricultural Production--Livestock **               | 02            | 261     | 263     | 2      | 0.8%              |
| Agricultural Services                               | 07            | 50      | 55      | 5      | 10.0%             |
| Forestry                                            | 08            | "0"     | "0"     | "0"    | "0"               |
| Fishing, Hunting, and Trapping                      | 09            |         |         |        |                   |
| Mining                                              |               | E 694   | E 855   | E 161  | E 23.2%           |
| Metal Mining                                        | 10            | 232     | 433     | 201    | 86.6%             |
| Coal Mining                                         | 12            | "0"     | "0"     | "0"    | "0"               |
| Oil and Gas Extraction                              | 13            | 13      | 37      | 24     | 184.6%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 449     | 385     | (64)   | -14.3%            |
| Construction                                        |               | 632     | 489     | (143)  | -22.6%            |
| General Building Contractors                        | 15            | 205     | 147     | (58)   | -28.3%            |
| Heavy Construction Contractors                      | 16            | 198     | 166     | (32)   | -16.2%            |
| Special Trade Contractors                           | 17            | 224     | 171     | (53)   | -23.7%            |
| Manufacturing                                       |               | 1,108   | 1,136   | 28     | 2.5%              |
| Food and Kindred Products                           | 20            | 141     | 120     | (21)   | -14.9%            |
| Textile Mill Products                               | 22            |         |         |        |                   |
| Apparel and Other Textile Products                  | 23            |         |         |        |                   |
| Lumber and Wood Products                            | 24            | 400     | 467     | 67     | 16.8%             |
| Furniture and Fixtures                              | 25            |         |         |        |                   |
| Paper and Allied Products                           | 26            |         |         |        |                   |
| Printing and Publishing                             | 27            | 172     | 187     | 15     | 8.7%              |
| Chemicals and Allied Products                       | 28            | "0"     | "0"     | "0"    | "0"               |
| Petroleum Refining and Related Industries           | 29            |         |         |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            |         |         |        |                   |
| Leather and Leather Products                        | 31            | "0"     | "0"     | "0"    | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | 29      | 22      | (7)    | -24.1%            |
| Primary Metals Processing                           | 33            | "0"     | "0"     | "0"    | "0"               |
| Fabricated Metal Products                           | 34            | 51      | 45      | (6)    | -11.8%            |
| Machinery, Except Electrical                        | 35            | "0"     | 12      | "0"    | "0"               |
| Electrical and Electronic Equipment                 | 36            | "0"     | "0"     | "0"    | "0"               |
| Transportation Equipment                            | 37            |         |         |        |                   |
| Instruments and Related Products                    | 38            | "0"     | "0"     | "0"    | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | 27      | 22      | (5)    | -18.5%            |
| Transportation and Public Utilities                 |               | 1,570   | "0"     | "0"    | "0"               |
| Local and Interurban Passenger Transit              | 41            | 112     | 103     | (9)    | -8.0%             |
| Trucking and Warehousing                            | 42            | 208     | 209     | 1      | 0.5%              |
| Water Transportation                                | 44            | "0"     | "0"     | "0"    | "0"               |
| Transportation by Air                               | 45            | "0"     | 15      | "0"    | "0"               |
| Pipelines, Except Natural Gas                       | 46            |         |         |        |                   |
| Transportation Services                             | 47            | 26      | 28      | 2      | 7.7%              |
| Communications                                      | 48            | 168     | 170     | 2      | 1.2%              |
| Electric, Gas, and Sanitary Services                | 49            | 1,043   | 1,044   | 1      | 0.1%              |
| Wholesale Trade                                     |               | 737     | 706     | (31)   | -4.2%             |
| Durable Goods                                       | 50            | 290     | 273     | (17)   | -5.9%             |
| Non-durable Goods                                   | 51            | 446     | 431     | (15)   | -3.4%             |
| Retail Trade                                        |               | 3,690   | 3,928   | 238    | 6.4%              |
| Building Materials and Hardware                     | 52            | 138     | 134     | (4)    | -2.9%             |
| General Merchandise Stores                          | 53            | 234     | 237     | 3      | 1.3%              |
| Food Stores                                         | 54            | 561     | 602     | 41     | 7.3%              |
| Automotive Dealers and Service Stations             | 55            | 509     | 507     | (2)    | -0.4%             |
| Apparel and Accessory Stores                        | 56            | 115     | 116     | 1      | 0.9%              |
| Furniture and Home Furnishings Stores               | 57            | 137     | 138     | 1      | 0.7%              |
| Eating and Drinking Places                          | 58            | 1,562   | 1,728   | 166    | 10.6%             |
| Miscellaneous Retail                                | 59            | 416     | 446     | 30     | 7.2%              |
| Finance, Insurance, and Real Estate                 |               | E 770   | E 743   | E (27) | E -3.5%           |
| Banking                                             | 60            | 311     | 297     | (14)   | -4.5%             |
| Credit Agencies other than Banks                    | 61            | 101     | 107     | 6      | 5.9%              |
| Security, Commodity Brokers, and Services           | 62            | 27      | 19      | (8)    | -29.6%            |
| Insurance Carriers                                  | 63            | 67      | 59      | (8)    | -11.9%            |
| Insurance Agents, Brokers, and Services             | 64            | 88      | 83      | (5)    | -5.7%             |
| Real Estate                                         | 65            | 176     | 178     | 2      | 1.1%              |
| Combined Real Estate, Insurance, Etc.               | 66            |         |         |        |                   |
| Holding and Other Investment Offices                | 67            | "0"     | "0"     | "0"    | "0"               |
| Services                                            |               | E 4,534 | E 4,761 | E 227  | E 5.0%            |
| Hotels and Other Lodging Places                     | 70            | 716     | 780     | 64     | 8.9%              |
| Personal Services                                   | 72            | 148     | 140     | (8)    | -5.4%             |
| Business Services                                   | 73            | 536     | 590     | 54     | 10.1%             |
| Auto Repair, Services, and Garages                  | 75            | 115     | 127     | 12     | 10.4%             |
| Miscellaneous Repair Services                       | 76            | 28      | 29      | 1      | 3.1%              |
| Motion Pictures                                     | 78            | 25      | 17      | (8)    | -32.0%            |
| Amusement and Recreation Services                   | 79            | 154     | 170     | 16     | 10.4%             |
| Private Health Services                             | 80            | 1,981   | 2,009   | 28     | 1.4%              |
| Legal Services                                      | 81            | 144     | 155     | 11     | 7.6%              |
| Private Educational Services                        | 82            | "0"     | "0"     | "0"    | "0"               |
| Private Social Services                             | 83            | 294     | 340     | 46     | 15.6%             |
| Museums, Art Galleries, Etc.                        | 84            | 23      | 25      | 2      | 8.7%              |
| Membership Organizations Including Tribal Gov't     | 86            | 185     | 190     | 5      | 2.7%              |
| Private Households                                  | 88            | 32      | 34      | 2      | 6.3%              |
| Engineering, Accounting, and Other Services         | 89            | 153     | 155     | 2      | 1.3%              |
| Non-Classifiable                                    | 99            | 6       |         | (6)    | -100.0%           |
| Government                                          |               | 5,529   | 5,483   | (46)   | -0.8%             |
| State                                               |               | 2,004   | 2,007   | 3      | 0.1%              |
| Local                                               |               | 2,698   | 2,615   | (83)   | -3.1%             |
| Federal                                             |               | 823     | 854     | 31     | 3.8%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.24

## UNEMPLOYMENT RATE--BUTTE REGION

1970 - 1987

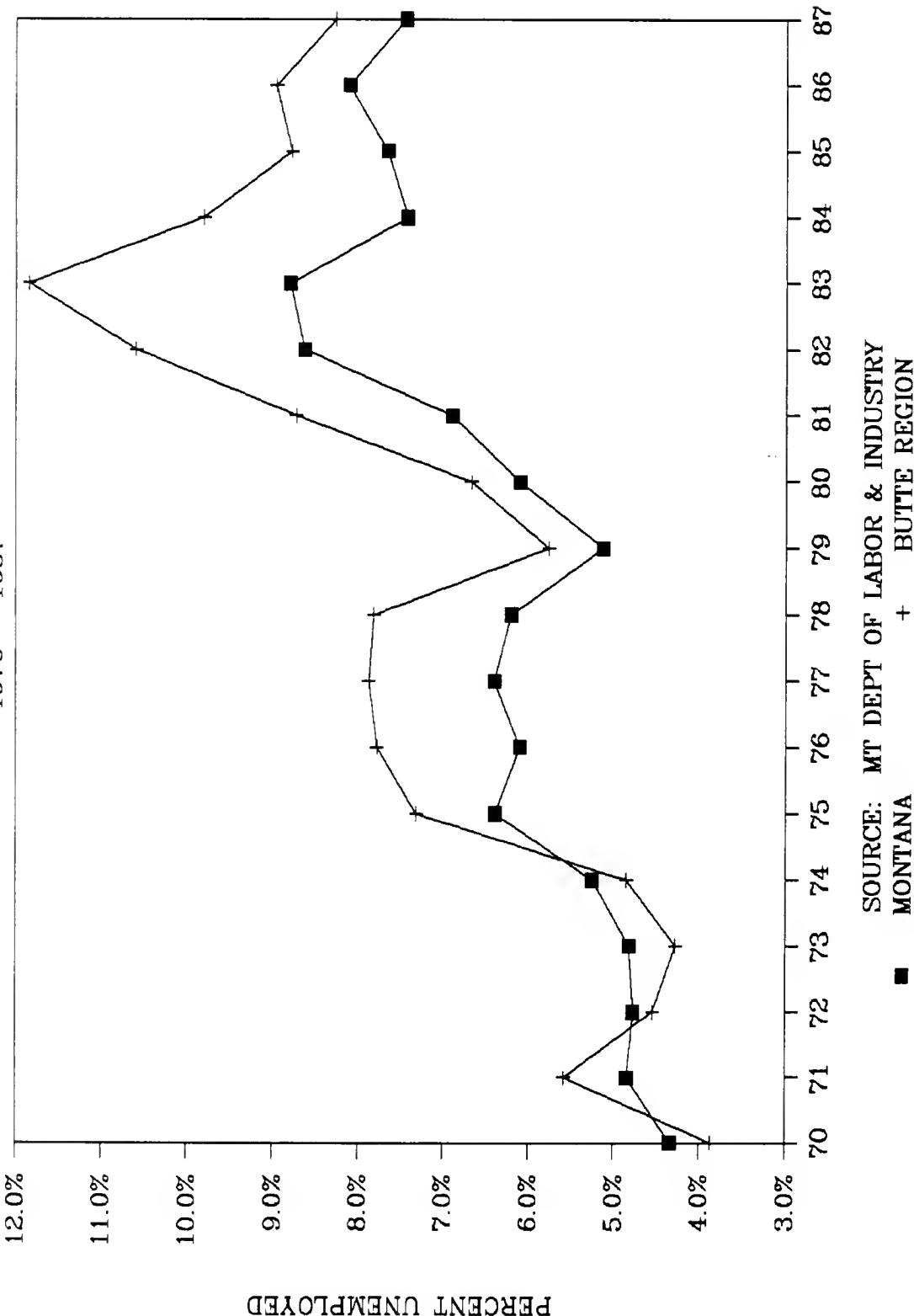
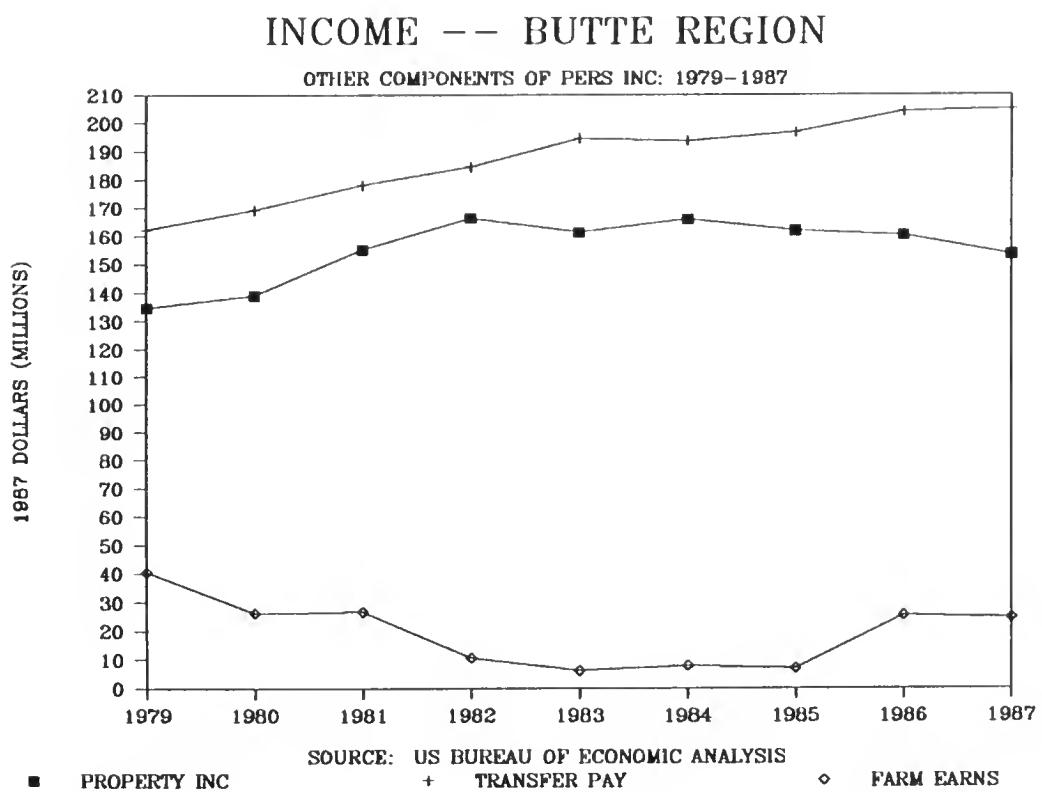
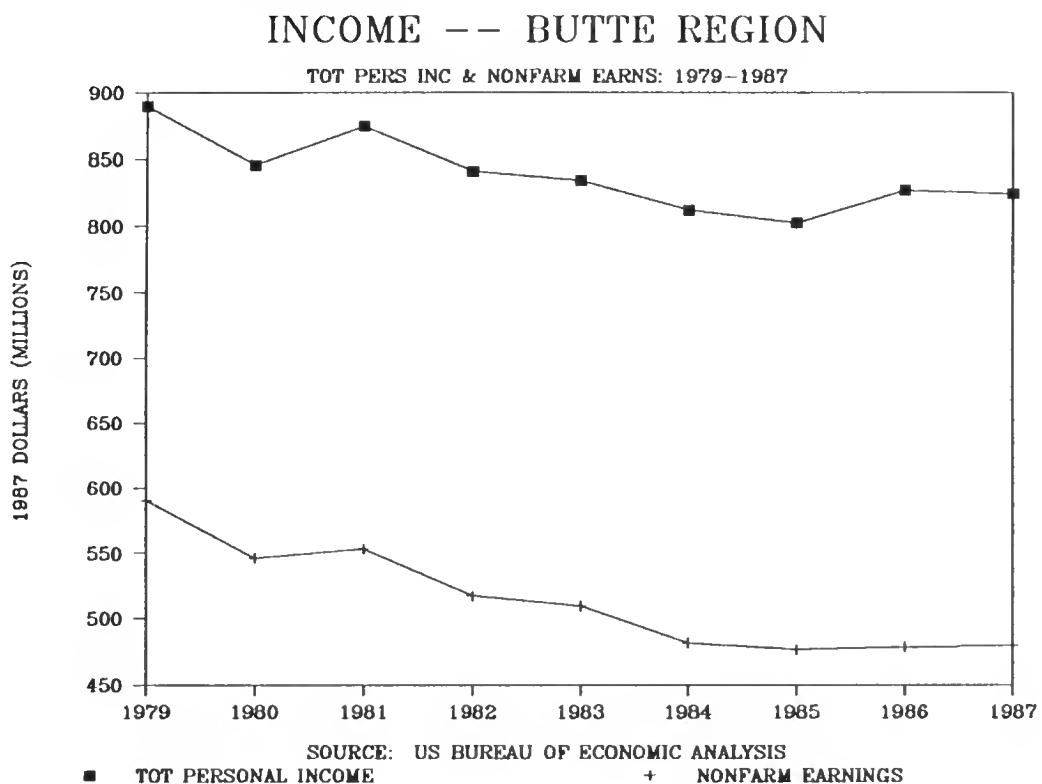


Figure 2.25



## The Glasgow-Wolf Point Region

The Glasgow-Wolf Point Region, located in the northeast corner of the state, encompasses Daniels, Phillips, Roosevelt, Sheridan, and Valley counties.

### Labor Force

The Glasgow-Wolf Point Region ranked ninth in the state in 1986 both in total jobs and in wage/salary jobs because the counties are among the least populated in the state (Table 2.24). Roosevelt and Valley counties, the two most populous counties, each contain about twice as many jobs as each of the other counties, with 5,400 and 4,600 jobs respectively.

Total jobs growth between 1969 and 1986 paralleled that of wage/salary jobs (Figure 2.26). During the early 1970s, steady growth led to a 1974 peak in total jobs. Sporadic performance after 1974 resulted in a general loss of jobs by 1986, with the largest declines coming after a 1981 peak in wage/salary jobs.

Between 1979 and 1986, wage/salary jobs declined by 8 percent, twice the statewide average decline of 4 percent. At the same time, the self-employed growth rate of 7.5 percent was the lowest in the state (Table 2.5). As a result, regional growth rate for total jobs remained well below the state average of 3 percent; in fact, it was negative from 1979 to 1986. The share of jobs held by the self-employed represents a significant portion of the region's employment: self-employment accounted for 35 percent of total jobs while the state average was only 26 percent. Contrary to the state trend of the self-employed holding an increasing share of jobs, this figure was down from 37 percent in 1969, reflecting a decrease in the number of self-employed between 1969 and 1979. The explanation for this regional decline involves the prominence of agriculture, a declining industry statewide.

In 1969, agriculture was the dominant industry in this region, accounting for 30 percent of the total jobs, with services, government, and retail trade trailing distantly. By 1986, however, a gradual and steady decline statewide in agriculture reduced its share to 22 percent, leaving it slightly behind services in terms of industry share and much closer to the government and retail trade shares. Within services, the largest employment components are private health services and membership organizations (including tribal government). Within the public services sector, local government, which includes school districts, is the largest employer. The largest manufacturing sector is apparel/other textiles products (A & S Tribal Industries).

Departure of military personnel from the Glasgow Air Force Base beginning in 1969 accompanied by a decline in the ordnance industry (military equipment and hardware) caused substantial regional job losses in the early 1970s. This loss was more than offset by growth in the service sectors, however, particularly in private business services where the Family Training Center in Valley County provided employment for several hundred. Declines since 1979 have spread throughout the region's economy, with all sectors except manufacturing, government, and finance/insurance/real estate declining between

1979 and 1986, and with growth in these industries ceasing between 1986 and 1987 (Table 2.25). Wage/salary employment in mining increased between 1986 and 1987, but added only 35 jobs, and total wage/salary employment declined by 125 jobs. It should be noted, however, that the yearly averages used to calculate this change actually obscure growth that occurred over the course of 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs posted an increase of 1.9 percent, or about 170 jobs.

Since the early 1970s, the unemployment rate in the Glasgow-Wolf Point Region has remained below and has fluctuated with the statewide average (Figure 2.28). A 1987 unemployment rate of 7.1 percent ranked the region sixth out of 12. Both Daniels and Sheridan counties had relatively low unemployment rates and thus ranked high among counties.

### Population

Booming population growth characterized the region from 1900 until 1920, when a plateau was reached that persisted for the next 20 years (Table 2.8). After 1960, population generally declined, with population lowest at 33,000 in 1987. In 1987, the region's population ranked ninth in the state.

Population of the Glasgow-Wolf Point Region, while not varying a great deal in absolute terms between 1969 and 1986, followed the trend in total jobs with a lag of between two and three years (Figures 2.26 and 2.27). For example, total jobs peaked in 1974 and declined to a low in 1977 while population peaked in 1976 and declined to a low in 1980. Between 1969 and 1987, a population decline of 12 percent was the second largest in the state. Performance relative to 1979 is somewhat better: a 5 percent decline ranked ninth among the regions in terms of population change.

### Income

Total personal income in 1986 in the Glasgow-Wolf Point Region ranked eighth in the state, slightly better than the ninth-place rankings of population, total jobs, and wage/salary jobs. At least part of the personal income ranking reflects agriculture's strong performance, a key component of personal income in this region.

The influence of farm earnings on total personal income and the volatility of this component are evident in Figure 2.29. Total personal income peaked in 1981, as did farm earnings and nonfarm earnings. (The nonfarm earnings peak was independent of the peak in farm earnings and resulted from increased employment during the construction of a natural gas pipeline across the region in 1981). In the following years, dramatic declines in farm earnings occurred, partially because of drought. In 1983, 1984, and 1985, farm earnings were actually negative in the Glasgow-Wolf Point Region, causing low total personal income for this period. Although nonfarm earnings continued to decline after 1984, a major recovery in the agricultural sector in 1986 caused total personal income to rebound. Personal income in 1987 was about the same as the 1986 level, as was farm earnings. Throughout the 1979-1987 period, property income and transfer payments followed statewide trends (Figures 2.11

and 2.29).

The Glasgow-Wolf Point Region ranked last in per capita income for the 1982-1986 period. This rank is somewhat misleading, however, because it averages four bad years for agriculture with only one good year. As Table 2.25 indicates, the one "good" year for agriculture, 1986, produced notably high per capita income figures throughout the region, particularly in Daniels and Sheridan counties.

The influence of farm earnings on per capita income is further evident between 1979 and 1987. Per capita income for the region peaked in 1981 with farm earnings, and then declined through 1985. The large reverse in farm earnings between 1985 and 1986 resulted in a similar increase in per capita income in that latter year.

Figure 2.26  
EMPLOYMENT--GLASGOW-WOLF POINT REGION

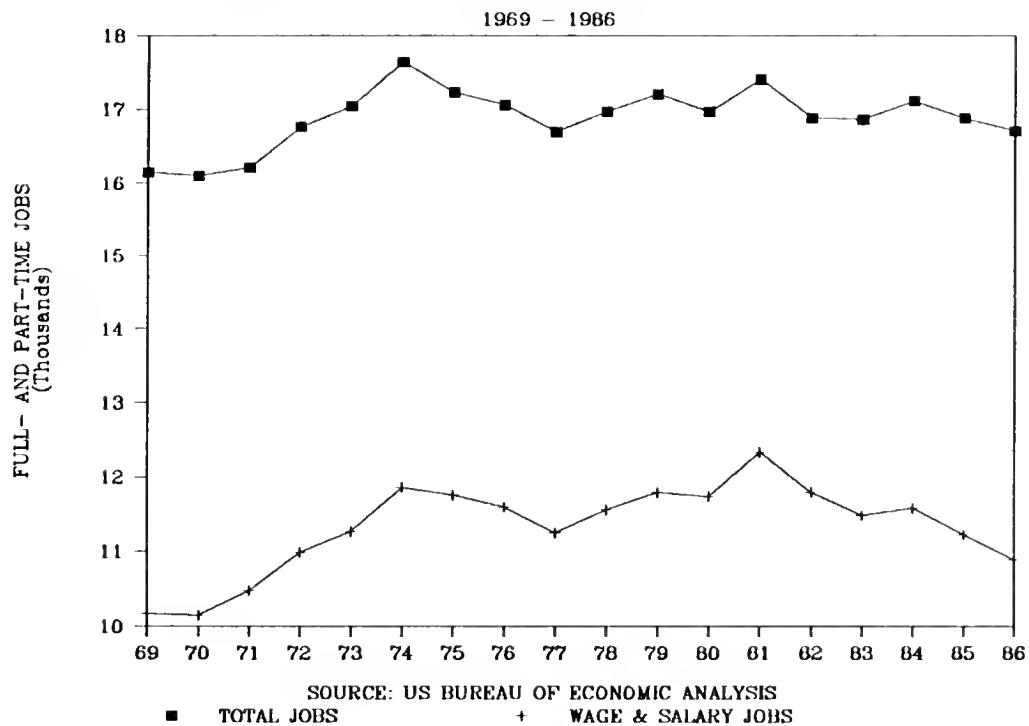


Figure 2.27  
POPULATION--GLASGOW-WOLF POINT REGION

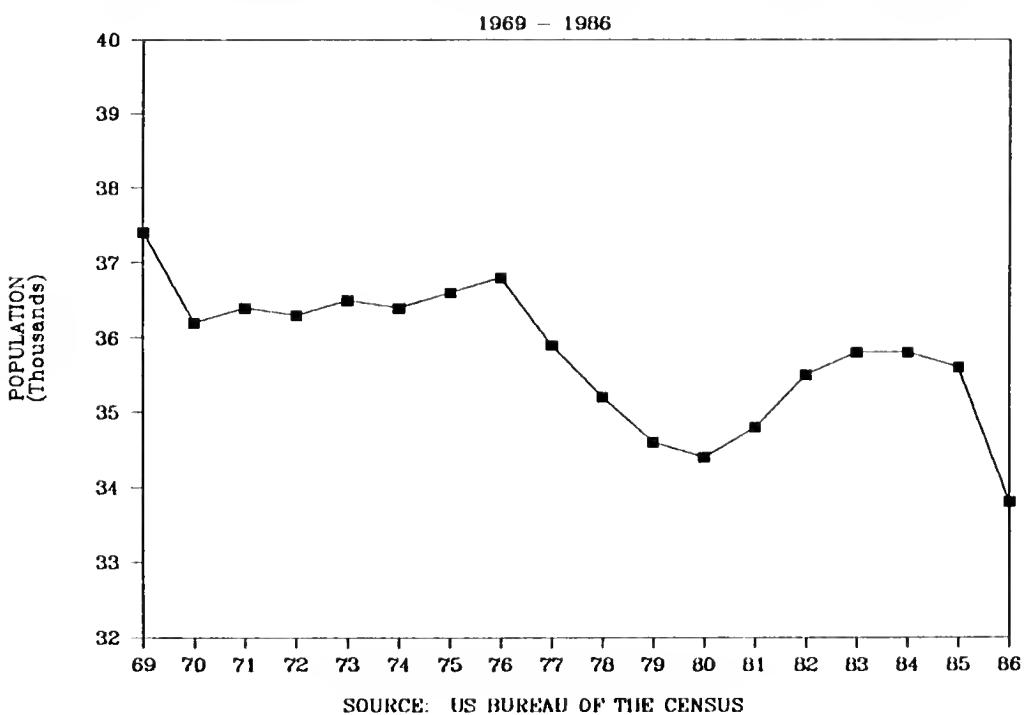


Table 2.24

|                                    | The Glasgow-Wolf Point Region |         |         |         |         |         |         |          |          |         |         | Rank in State /d   |
|------------------------------------|-------------------------------|---------|---------|---------|---------|---------|---------|----------|----------|---------|---------|--------------------|
|                                    | 1959                          | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984     | 1985     | 1986    | 1987 /p | (Region or County) |
| Population /a                      |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 44,600                        | 37,400  | 34,600  | 34,400  | 34,800  | 35,500  | 35,800  | 35,800   | 35,600   | 33,800  | 33,000  | 9                  |
| Daniels                            | 3,700                         | 3,100   | 2,900   | 2,800   | 2,800   | 2,800   | 2,800   | 2,800    | 2,700    | 2,600   | 2,600   | 43                 |
| Phillips                           | 6,000                         | 5,500   | 5,200   | 5,400   | 5,400   | 5,400   | 5,600   | 5,700    | 5,700    | 5,500   | 5,400   | 34                 |
| Roosevelt                          | 11,600                        | 10,500  | 10,200  | 10,500  | 10,800  | 11,300  | 11,600  | 11,600   | 11,700   | 11,300  | 11,200  | 17                 |
| Sheridan                           | 6,400                         | 5,900   | 5,500   | 5,500   | 5,700   | 6,000   | 6,000   | 5,900    | 5,800    | 5,500   | 5,300   | 35                 |
| Valley                             | 16,900                        | 12,400  | 10,800  | 10,200  | 10,100  | 10,000  | 9,800   | 9,800    | 9,700    | 8,900   | 8,600   | 22                 |
| Total Jobs /b                      |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | ...                           | 16,150  | 17,209  | 16,965  | 17,407  | 16,886  | 16,864  | 17,113   | 16,882   | 16,709  | ...     | 9                  |
| Daniels                            | ...                           | 1,620   | 1,517   | 1,443   | 1,512   | 1,563   | 1,511   | 1,482    | 1,449    | 1,446   | ...     | 42                 |
| Phillips                           | ...                           | 2,128   | 2,530   | 2,579   | 2,550   | 2,553   | 2,637   | 2,743    | 2,627    | 2,767   | ...     | 34                 |
| Roosevelt                          | ...                           | 4,211   | 5,025   | 4,940   | 5,128   | 5,304   | 5,427   | 5,511    | 5,539    | 5,415   | ...     | 18                 |
| Sheridan                           | ...                           | 2,631   | 2,879   | 2,960   | 3,016   | 2,780   | 2,653   | 2,682    | 2,612    | 2,505   | ...     | 35                 |
| Valley                             | ...                           | 5,150   | 5,258   | 5,043   | 5,201   | 4,686   | 4,636   | 4,695    | 4,655    | 4,578   | ...     | 21                 |
| Wage & Salary Jobs /b              |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | ...                           | 10,160  | 11,793  | 11,738  | 12,331  | 11,799  | 11,481  | 11,582   | 11,227   | 10,885  | ...     | 9                  |
| Daniels                            | ...                           | 761     | 906     | 848     | 912     | 970     | 873     | 848      | 805      | 789     | ...     | 42                 |
| Phillips                           | ...                           | 1,228   | 1,609   | 1,688   | 1,642   | 1,604   | 1,661   | 1,725    | 1,583    | 1,691   | ...     | 32                 |
| Roosevelt                          | ...                           | 3,184   | 3,048   | 3,614   | 3,775   | 3,939   | 3,992   | 4,033    | 4,021    | 3,846   | ...     | 18                 |
| Sheridan                           | ...                           | 1,295   | 1,833   | 1,964   | 2,229   | 2,006   | 1,852   | 1,840    | 1,760    | 1,634   | ...     | 33                 |
| Valley                             | ...                           | 3,692   | 3,797   | 3,624   | 3,773   | 3,280   | 3,123   | 3,136    | 3,058    | 2,925   | ...     | 23                 |
| Unemployment Rate /c               |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | ...                           | 4.3%    | 3.9%    | 4.2%    | 4.6%    | 6.9%    | 8.2%    | 6.4%     | 7.0%     | 7.8%    | 7.1%    | 6                  |
| Daniels                            | ...                           | 3.2%    | 2.0%    | 1.8%    | 2.1%    | 3.0%    | 4.4%    | 4.2%     | 4.2%     | 4.7%    | 4.6%    | 7                  |
| Phillips                           | ...                           | 4.2%    | 3.7%    | 4.1%    | 4.8%    | 7.7%    | 8.4%    | 6.9%     | 9.7%     | 7.5%    | 6.9%    | 26                 |
| Roosevelt                          | ...                           | 5.8%    | 4.7%    | 5.3%    | 5.8%    | 7.5%    | 9.0%    | 7.0%     | 7.8%     | 9.5%    | 8.8%    | 39                 |
| Sheridan                           | ...                           | 3.3%    | 1.5%    | 1.6%    | 1.3%    | 4.8%    | 6.6%    | 4.7%     | 5.8%     | 5.7%    | 4.8%    | 9                  |
| Valley                             | ...                           | 4.0%    | 5.1%    | 5.4%    | 6.4%    | 8.7%    | 9.7%    | 6.8%     | 7.1%     | 8.0%    | 7.1%    | 28                 |
| Total Personal Income (\$1000s) /b |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 235,175                       | 340,202 | 377,458 | 386,047 | 439,487 | 399,350 | 368,707 | 365,597  | 351,291  | 414,721 | 407,000 | 8                  |
| Daniels                            | 20,407                        | 34,882  | 33,967  | 35,568  | 40,790  | 40,508  | 31,940  | 29,494   | 28,232   | 40,939  | ...     | 40                 |
| Phillips                           | 34,648                        | 43,384  | 55,059  | 56,818  | 61,858  | 53,764  | 50,539  | 52,485   | 47,741   | 61,892  | ...     | 36                 |
| Roosevelt                          | 50,401                        | 89,532  | 102,761 | 109,089 | 116,457 | 112,758 | 112,158 | 111,034  | 110,207  | 119,189 | ...     | 20                 |
| Sheridan                           | 36,694                        | 59,109  | 63,867  | 64,799  | 85,865  | 78,136  | 70,442  | 69,154   | 66,706   | 78,308  | ...     | 30                 |
| Valley                             | 93,025                        | 113,295 | 121,804 | 119,794 | 136,537 | 114,183 | 103,629 | 103,430  | 98,405   | 114,593 | ...     | 21                 |
| Per Capita Personal Income /b      |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 5,273                         | 9,097   | 10,903  | 11,211  | 12,662  | 11,259  | 10,294  | 10,245   | 9,863    | 12,284  | 12,300  | 12                 |
| Daniels                            | 5,516                         | 11,096  | 11,898  | 12,561  | 14,552  | 14,498  | 11,314  | 10,628   | 10,270   | 15,782  | ...     | 10                 |
| Phillips                           | 5,775                         | 7,957   | 10,532  | 10,573  | 11,470  | 9,920   | 8,964   | 9,206    | 8,402    | 11,278  | ...     | 52                 |
| Roosevelt                          | 4,343                         | 8,511   | 10,041  | 10,348  | 10,768  | 9,999   | 9,693   | 9,602    | 9,423    | 10,511  | ...     | 45                 |
| Sheridan                           | 5,733                         | 10,105  | 11,635  | 11,840  | 14,718  | 13,016  | 11,784  | 11,741   | 11,467   | 14,347  | ...     | 11                 |
| Valley                             | 5,504                         | 9,114   | 11,262  | 11,728  | 13,578  | 11,447  | 10,564  | 10,602   | 10,171   | 12,881  | ...     | 28                 |
| Nonfarm Earnings (\$1000s) /b      |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 145,065                       | 173,619 | 232,501 | 226,944 | 255,412 | 220,488 | 213,713 | 218,885  | 210,788  | 205,861 | 203,000 | 9                  |
| Daniels                            | 9,812                         | 10,420  | 14,690  | 13,638  | 14,263  | 15,222  | 14,015  | 13,782   | 13,128   | 12,955  | ...     | 42                 |
| Phillips                           | 14,499                        | 17,919  | 29,357  | 30,888  | 28,800  | 27,342  | 28,895  | 33,106   | 28,588   | 31,251  | ...     | 31                 |
| Roosevelt                          | 31,677                        | 51,577  | 72,088  | 68,786  | 69,551  | 72,768  | 75,843  | 74,565   | 74,500   | 71,548  | ...     | 19                 |
| Sheridan                           | 18,073                        | 23,985  | 38,703  | 41,785  | 48,871  | 40,410  | 35,601  | 34,816   | 35,726   | 31,729  | ...     | 29                 |
| Valley                             | 71,004                        | 69,718  | 77,663  | 71,848  | 93,926  | 66,746  | 61,359  | 62,615   | 60,846   | 58,378  | ...     | 21                 |
| Farm Earnings (\$1000s) /b         |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 38,821                        | 91,385  | 20,425  | 27,180  | 55,436  | 25,467  | (8,964) | (17,138) | (26,341) | 43,628  | 38,000  | 5                  |
| Daniels                            | 5,213                         | 15,109  | 5,130   | 6,938   | 10,139  | 8,807   | 812     | (1,307)  | (1,695)  | 11,231  | ...     | 12                 |
| Phillips                           | 11,610                        | 12,606  | 4,494   | 4,467   | 9,441   | 1,114   | (4,270) | (5,683)  | (6,626)  | 5,604   | ...     | 31                 |
| Roosevelt                          | 5,302                         | 18,266  | 816     | 6,814   | 9,689   | 2,296   | (4,074) | (5,312)  | (6,810)  | 4,679   | ...     | 37                 |
| Sheridan                           | 8,672                         | 21,070  | 3,666   | 1,206   | 11,805  | 10,169  | 2,401   | 368      | (1,108)  | 12,218  | ...     | 11                 |
| Valley                             | 8,025                         | 23,734  | 6,359   | 7,755   | 14,363  | 3,081   | (3,833) | (5,204)  | (8,042)  | 9,898   | ...     | 16                 |
| Property Income (\$1000s) /b       |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 30,386                        | 46,611  | 82,710  | 87,045  | 96,290  | 102,285 | 107,354 | 108,936  | 107,194  | 106,575 | 106,000 | 8                  |
| Daniels                            | 3,578                         | 5,821   | 9,725   | 10,243  | 11,227  | 11,209  | 11,475  | 11,950   | 11,707   | 11,596  | ...     | 39                 |
| Phillips                           | 5,172                         | 7,523   | 13,973  | 14,650  | 15,980  | 16,401  | 16,918  | 16,763   | 16,009   | 15,901  | ...     | 34                 |
| Roosevelt                          | 7,118                         | 11,728  | 18,194  | 19,341  | 21,789  | 22,894  | 26,160  | 25,643   | 25,937   | 25,823  | ...     | 18                 |
| Sheridan                           | 6,230                         | 9,423   | 16,938  | 18,051  | 20,350  | 22,081  | 24,821  | 26,038   | 25,899   | 25,767  | ...     | 19                 |
| Valley                             | 8,287                         | 12,116  | 23,880  | 24,760  | 20,943  | 29,699  | 27,980  | 28,542   | 27,642   | 27,488  | ...     | 15                 |
| Transfer Payments (\$1000s) /b     |                               |         |         |         |         |         |         |          |          |         |         |                    |
| Region                             | 25,561                        | 38,225  | 59,160  | 62,413  | 65,912  | 69,207  | 72,668  | 72,432   | 74,256   | 76,428  | 77,000  | 8                  |
| Daniels                            | 2,164                         | 4,255   | 5,645   | 5,866   | 6,332   | 6,562   | 6,828   | 6,330    | 6,382    | 6,482   | ...     | 43                 |
| Phillips                           | 3,840                         | 5,937   | 8,830   | 9,114   | 9,814   | 10,900  | 11,027  | 11,640   | 11,971   | 12,302  | ...     | 35                 |
| Roosevelt                          | 6,893                         | 11,198  | 17,062  | 18,080  | 19,129  | 20,283  | 21,412  | 21,667   | 22,235   | 22,976  | ...     | 19                 |
| Sheridan                           | 4,192                         | 5,220   | 8,813   | 9,450   | 9,803   | 10,700  | 11,518  | 11,697   | 11,713   | 12,035  | ...     | 36                 |
| Valley                             | 8,472                         | 11,615  | 18,811  | 19,904  | 20,834  | 20,763  | 21,882  | 21,954   | 22,633   | 22,633  | ...     | 20                 |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.25

| INDUSTRY                                            | SIC**<br>CODE | 1986  | 1987  | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|-------|-------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 8,957 | 8,832 | (125)  | -1.4%             |
| Total Private                                       |               | 6,387 | 6,262 | (125)  | -2.0%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 67    | 72    | 5      | 7.5%              |
| Agricultural Production-Crops ***                   | 01            | 9     | 14    | 5      | 55.6%             |
| Agricultural Production-Livestock ***               | 02            | 28    | 26    | (2)    | -7.1%             |
| Agricultural Services                               | 07            | 27    | 28    | 1      | 3.7%              |
| Forestry                                            | 08            |       |       |        |                   |
| Fishing, Hunting, and Trapping                      | 09            |       |       |        |                   |
| Mining                                              |               | 253   | 288   | 35     | 13.8%             |
| Metal Mining                                        | 10            | "0"   | "0"   | "0"    | "0"               |
| Coal Mining                                         | 12            | "0"   | "0"   | "0"    | "0"               |
| Oil and Gas Extraction                              | 13            | 131   | 154   | 23     | 17.6%             |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 7     | "0"   | "0"    | "0"               |
| Construction                                        |               | 221   | 198   | (23)   | -10.4%            |
| General Building Contractors                        | 15            | 64    | 51    | (13)   | -20.3%            |
| Heavy Construction Contractors                      | 16            | 49    | 66    | 17     | 34.7%             |
| Special Trade Contractors                           | 17            | 105   | 74    | (31)   | -29.5%            |
| Manufacturing                                       |               | 682   | 628   | (54)   | -7.9%             |
| Food and Kindred Products                           | 20            | 41    | 23    | (18)   | -43.9%            |
| Textile Mill Products                               | 22            |       |       |        |                   |
| Apparel and Other Textile Products                  | 23            | "0"   | "0"   | "0"    | "0"               |
| Lumber and Wood Products                            | 24            | "0"   | "0"   | "0"    | "0"               |
| Furniture and Fixtures                              | 25            |       |       |        |                   |
| Paper and Allied Products                           | 26            |       |       |        |                   |
| Printing and Publishing                             | 27            | 50    | 47    | (3)    | -6.0%             |
| Chemicals and Allied Products                       | 28            | "0"   | "0"   | "0"    | "0"               |
| Petroleum Refining and Related Industries           | 29            | "0"   | "0"   | "0"    | "0"               |
| Rubber and Miscellaneous Plastic Products           | 30            |       |       |        |                   |
| Leather and Leather Products                        | 31            |       |       |        |                   |
| Stone, Clay, Glass, and Concrete Products           | 32            | 38    | 53    | 15     | 39.5%             |
| Primary Metals Processing                           | 33            |       |       |        |                   |
| Fabricated Metal Products                           | 34            | "0"   | "0"   | "0"    | "0"               |
| Machinery, Except Electrical                        | 35            | "0"   | "0"   | "0"    | "0"               |
| Electrical and Electronic Equipment                 | 36            | "0"   | "0"   | "0"    | "0"               |
| Transportation Equipment                            | 37            |       |       |        |                   |
| Instruments and Related Products                    | 38            |       |       |        |                   |
| Miscellaneous Manufacturing Industries              | 39            |       |       |        |                   |
| Transportation and Public Utilities                 |               | E 421 | E 407 | E (14) | E -3.3%           |
| Local and Interurban Passenger Transit              | 41            | 7     | 7     | 0      | 0.0%              |
| Trucking and Warehousing                            | 42            | 128   | 115   | (13)   | -10.2%            |
| Water Transportation                                | 44            | "0"   | "0"   | "0"    | "0"               |
| Transportation by Air                               | 45            | 9     | 7     | (2)    | -22.2%            |
| Pipelines, Except Natural Gas                       | 46            |       |       |        |                   |
| Transportation Services                             | 47            | 5     | 6     | 1      | 20.0%             |
| Communications                                      | 48            | 122   | 120   | (2)    | -1.6%             |
| Electric, Gas, and Sanitary Services                | 49            | 150   | 152   | 2      | 1.3%              |
| Wholesale Trade                                     |               | 477   | 460   | (17)   | -3.6%             |
| Durable Goods                                       | 50            | 206   | 192   | (14)   | -6.8%             |
| Non-durable Goods                                   | 51            | 268   | 265   | (3)    | -1.1%             |
| Retail Trade                                        |               | 1,778 | 1,724 | (54)   | -3.0%             |
| Building Materials and Hardware                     | 52            | 151   | 157   | 6      | 4.0%              |
| General Merchandise Stores                          | 53            | 93    | 95    | 2      | 2.2%              |
| Food Stores                                         | 54            | 363   | 345   | (18)   | -5.0%             |
| Automotive Dealers and Service Stations             | 55            | 266   | 257   | (9)    | -3.4%             |
| Apparel and Accessory Stores                        | 56            | 90    | 84    | (6)    | -6.7%             |
| Furniture and Home Furnishings Stores               | 57            | 32    | 40    | 8      | 25.0%             |
| Eating and Drinking Places                          | 58            | 653   | 598   | (55)   | -8.4%             |
| Miscellaneous Retail                                | 59            | 115   | 131   | 16     | 13.9%             |
| Finance, Insurance, and Real Estate                 |               | 443   | 437   | (6)    | -1.4%             |
| Banking                                             | 60            | 254   | 243   | (11)   | -4.3%             |
| Credit Agencies other than Banks                    | 61            | 52    | 54    | 2      | 3.8%              |
| Security, Commodity Brokers, and Services           | 62            |       |       |        |                   |
| Insurance Carriers                                  | 63            | "0"   | "0"   | "0"    | "0"               |
| Insurance Agents, Brokers, and Services             | 64            | 46    | 40    | (6)    | -13.0%            |
| Real Estate                                         | 65            | 74    | 81    | 7      | 9.5%              |
| Combined Real Estate, Insurance, Etc.               | 66            | "0"   | "0"   | "0"    | "0"               |
| Holding and Other Investment Offices                | 67            | "0"   | "0"   | "0"    | "0"               |
| Services                                            |               | 2,014 | 2,019 | 5      | 0.2%              |
| Hotels and Other Lodging Places                     | 70            | 221   | 215   | (6)    | -2.7%             |
| Personal Services                                   | 72            | 41    | 43    | 2      | 4.9%              |
| Business Services                                   | 73            | 72    | 62    | (10)   | -13.9%            |
| Auto Repair, Services, and Garages                  | 75            | 36    | 34    | (2)    | -5.6%             |
| Miscellaneous Repair Services                       | 76            | 10    | 8     | (2)    | -20.0%            |
| Motion Pictures                                     | 78            | 31    | 25    | (6)    | -19.4%            |
| Amusement and Recreation Services                   | 79            | 23    | 21    | (2)    | -8.7%             |
| Private Health Services                             | 80            | 932   | 953   | 21     | 2.3%              |
| Legal Services                                      | 81            | 32    | 36    | 4      | 12.5%             |
| Private Educational Services                        | 82            | "0"   | 77    | "0"    | "0"               |
| Private Social Services                             | 83            | 90    | 93    | 3      | 3.3%              |
| Museums, Art Galleries, Etc.                        | 84            |       |       |        |                   |
| Membership Organizations Including Tribal Gov't     | 86            | 413   | 383   | (30)   | -7.3%             |
| Private Households                                  | 88            | "0"   | 5     | "0"    | "0"               |
| Engineering, Accounting, and Other Services         | 89            | 46    | 43    | (3)    | -6.5%             |
| Non-Classifiable                                    | 99            | "0"   | "0"   | "0"    | "0"               |
| Government                                          |               | 2,568 | 2,568 | 0      | 0.0%              |
| State                                               |               | 214   | 200   | (14)   | -6.5%             |
| Local                                               |               | 1,846 | 1,846 | 0      | 0.0%              |
| Federal                                             |               | 503   | 517   | 14     | 2.8%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.28

## UNEMPLOYMENT RATE--GLASGOW-WOLF PT REG

1970 - 1987

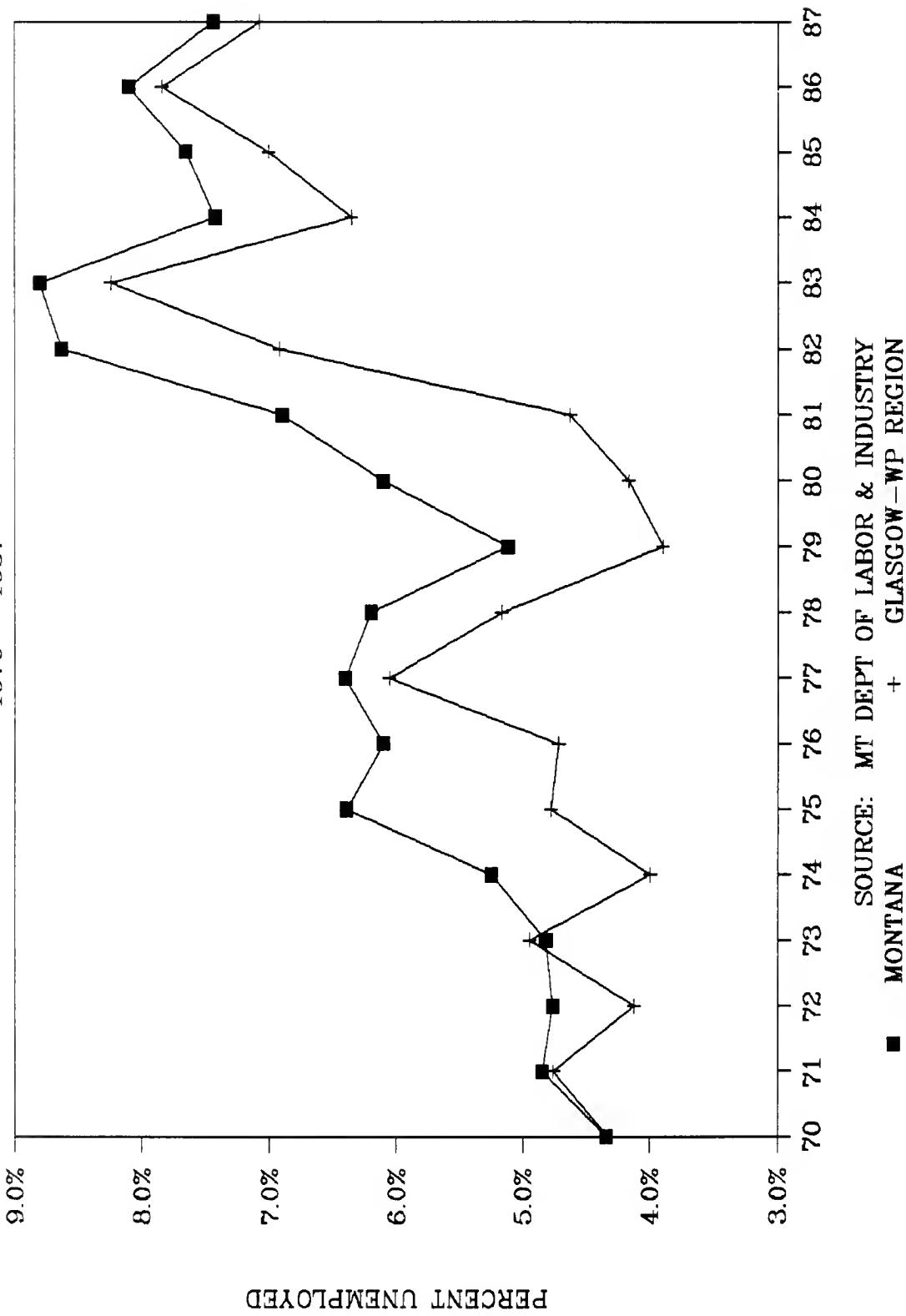
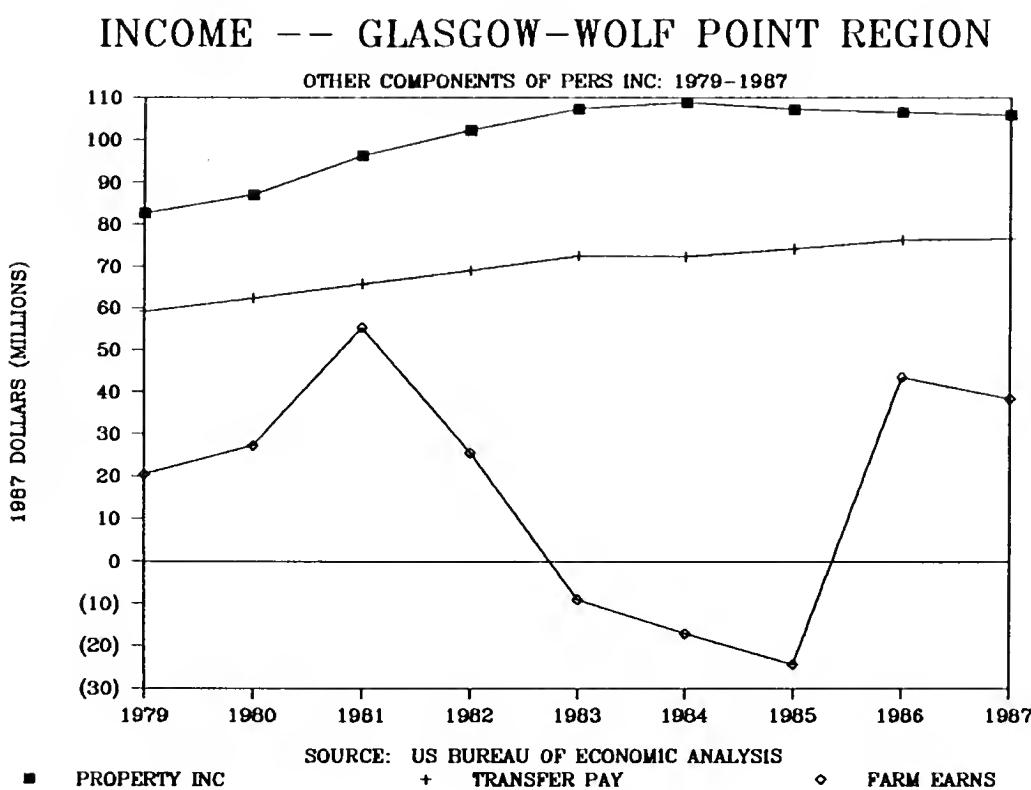
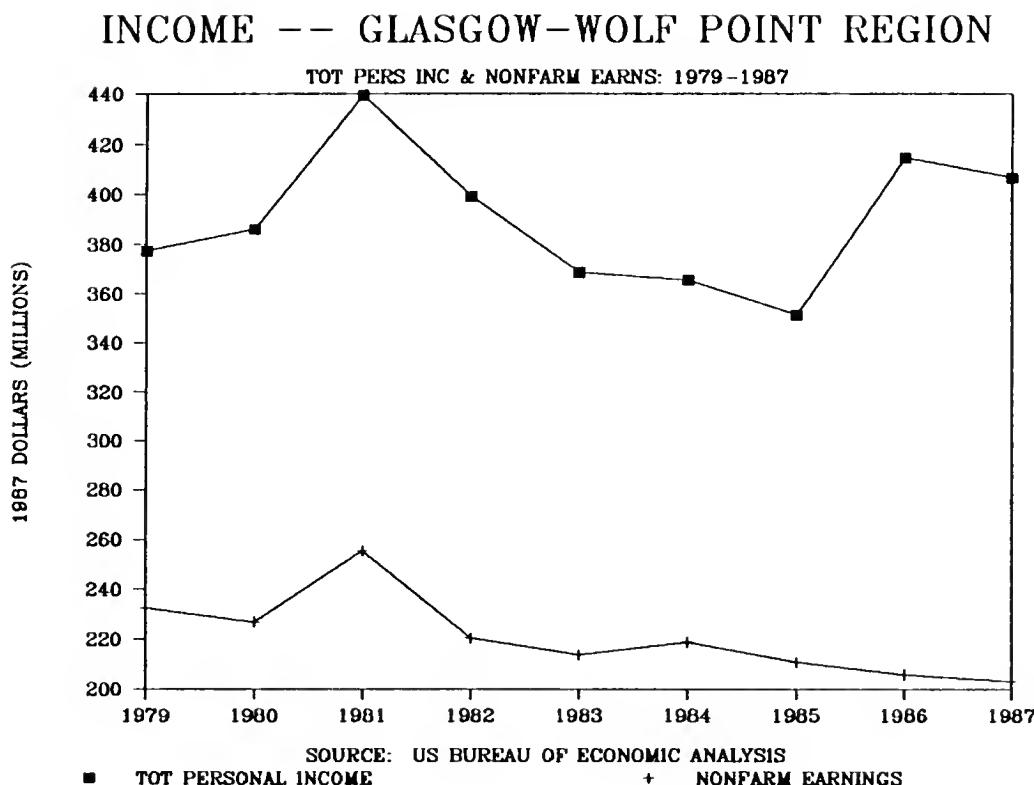


Figure 2.29



## The Glendive-Sidney Region

Located in eastern Montana, the Glendive-Sidney Region includes Dawson, Garfield, McCone, Prairie, Richland, and Wibaux counties.

### Labor Force

With just over 15,500 total jobs, the Glendive-Sidney Region ranked 10th in 1986 among Montana's regions (Table 2.26). Most jobs were concentrated in Richland and Dawson counties, which ranked 14th and 16th out of 56 counties in total number of jobs, respectively. In 1986, the region accounted for 3.8 percent of Montana's jobs, down from 4.7 percent in 1969 (Figure 2.3).

Steady job growth in the 1970s (slow at first and then gradually accelerating until 1981) resulted in a peak in both total and wage/salary jobs in 1981 (Figure 2.30). Oil/gas exploration activity produced most of the growth. Since 1981, however, a sharp decline in jobs has characterized the region, with total jobs falling 19 percent by 1986. In 1987, wage/salary jobs declined, continuing this trend. A decrease in oil/gas exploration was the primary cause of the downward trend.

Moderate growth in self-employment, which accounts for about one-third of total jobs in the region, has helped to mollify this decline. Between 1979 and 1986, when wage/salary jobs declined by 16 percent, the number of self-employed grew by 17 percent. Although this rate was well below the statewide average of 30 percent, it was sufficient to hold the loss of total jobs to 7 percent (Table 2.5).

The most important employing sectors in the Glendive-Sidney Region include agriculture, retail trade, services, government, and oil/gas mining, which fluctuates greatly from year to year. As has been the case statewide, the regional dominance of agriculture in the region has been declining over the last 20 years. In 1969, agriculture accounted for 29 percent of all jobs, but by 1986 it had fallen to 18 percent. The shares of retail trade, services, wholesale trade, and finance/insurance/real estate all have increased over this period, reflecting the gradual shift throughout the state and the nation toward service-oriented industries.

The 1970s witnessed steady employment growth for all sectors of the economy except for agriculture and food products manufacturing. Sectoral job growth continued until 1981, except for government and agriculture/food products. Between 1981 and 1986, as total jobs declined markedly (Figure 2.30), wage/salary employment declined in every sector except government. A loss of about 2,000 jobs in the oil/gas extraction industry as exploration activity declined (world oil prices peaked in 1981) dominated the downturn, producing large declines in other segments of the economy. Declines in wage/salary jobs continued between 1986 and 1987 (Table 2.27), when losses in every major sector resulted in a regional decline of more than 600 jobs (7 percent). It should be noted, however, that this figure overstates the magnitude of the decline because the gradual improvement over the course of 1987 is hidden in the annual average data. In comparing the fourth quarter of 1986 with the

fourth quarter of 1987, the decline involved only about 300 jobs, or 3.6 percent of the wage/salary jobs.

The unemployment rate in the Glendive-Sidney Region remained well below the state average in the 1970s (Figure 2.32). The exception to this experience is obvious from the graph: between 1981 and 1983, the unemployment rate increased threefold--to 9.4 percent--mainly in Dawson, Richland, and Wibaux counties. Much of this increase likely was created by declining oil/gas employment and the delay in the out-migration of unemployed workers. After 1983, however, the unemployment rate returned to a point below the state average, and by 1987 the region's unemployment rate of 6.8 percent was third lowest in the state, and under the statewide rate of 7.4 percent. (Low unemployment rates are typical for counties dominated by agriculture.) Table 2.26 shows unemployment rates of 2.8 percent for McCone County and 3.4 percent for Garfield County, ranking them first and second respectively among the state's counties.

### Population

With a population just under 30,000, the Glendive-Sidney Region ranked 10th among the regions in 1987. As with jobs, most of the population was located in Richland and Dawson counties.

Regional population peaked in 1930 after strong, early growth. Since that time, however, population growth has been erratic (Table 2.8). Population growth was strong between 1969 and 1982 (Figure 2.31), but between 1982 and 1987, steady declines in population occurred, following the trend in total jobs. Indeed, a close relationship between total (or wage/salary) jobs and population seems to hold between 1969 and 1986, with a lag of about one year. For example, the lowest population in the region for this time period (1972) occurred one year after total jobs was at its lowest point (1971). And population peaked in 1982 just one year after the 1981 peak in total jobs.

### Income

Total personal income in the Glendive-Sidney Region ranked 10th in the state in 1986, consistent with the ranks of population and total jobs (Table 2.26). As with population and jobs, most of this income was located in Richland and Dawson counties.

Total personal income was influenced by two major factors during the 1979-1987 period: both nonfarm earnings and farm earnings peaked in 1981, with the peak in nonfarm worker earnings related to oil/gas exploration. As a result, total personal income peaked in 1981 (Figure 2.33). Decline in nonfarm earnings after 1981, coupled with the severe decrease in farm earnings during the 1981-1985 period, resulted in a steady decline in total personal income between 1981 and 1985. Farm earnings recovered in 1986 and ranked third in the state. Recovery in the agricultural sector more than offset the continued decline in nonfarm earnings, and total personal income increased in 1986. During 1987, however, estimated farm earnings remained relatively constant, and the decline in nonfarm earnings translated into another decline in

personal income. Throughout this entire period, property income and transfer payments followed the statewide trend by increasing slightly.

The Glendive-Sidney Region ranked sixth in per capita income for the 1982-1986 period among Montana's regions (Table 2.26). Dawson County, which ranked 12th, had the highest county rank in the region. Because this average includes four bad years for agriculture and only one good year, however, it is potentially misleading.

Figure 2.30

## EMPLOYMENT--GLENDALE-SIDNEY REGION

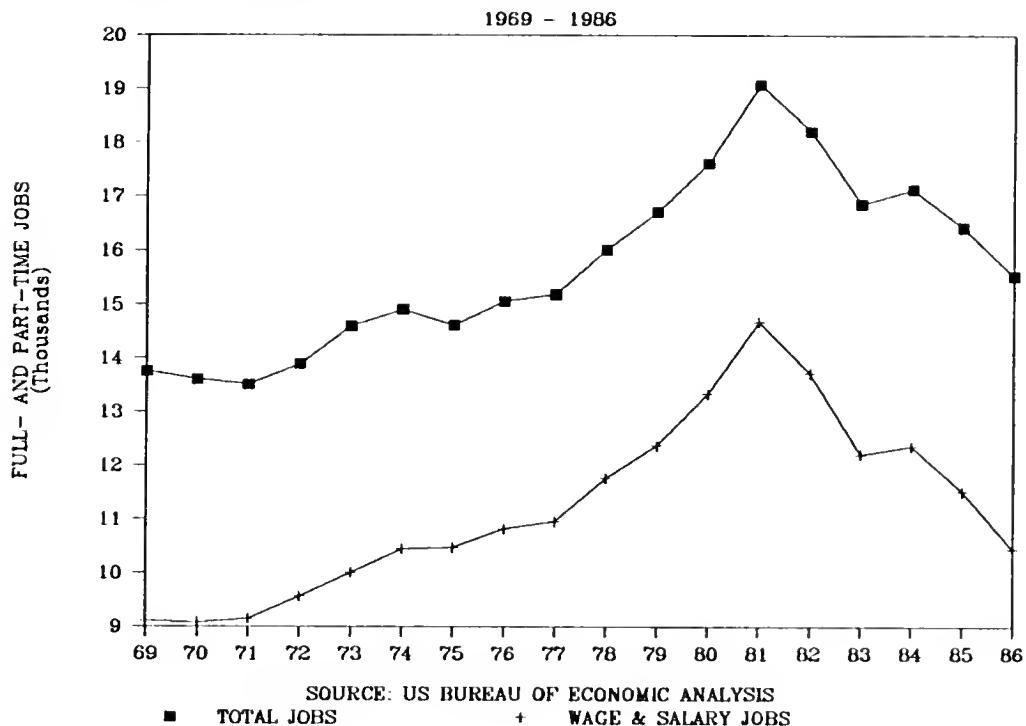


Figure 2.31

## POPULATION--GLENDALE-SIDNEY REGION

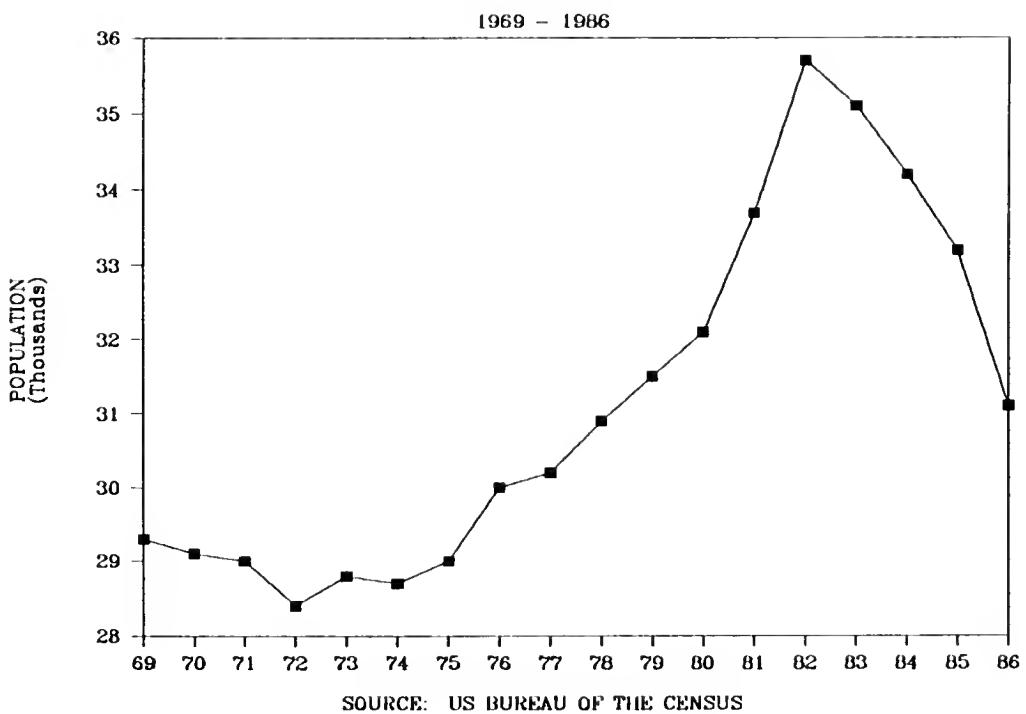


Table 2.26

## The Glandive-Sidney Region

|                                           | 1959               | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987 /p | Rank in State /d |
|-------------------------------------------|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|------------------|
|                                           | (Region or County) |         |         |         |         |         |         |         |         |         |         |                  |
| <b>Population /a</b>                      |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 31,900             | 29,300  | 31,500  | 52,100  | 33,700  | 39,700  | 39,100  | 34,200  | 33,200  | 31,100  | 29,600  | 10               |
| Dawson                                    | 12,200             | 11,400  | 11,900  | 11,900  | 12,200  | 12,800  | 12,600  | 12,200  | 11,800  | 10,900  | 10,300  | 20               |
| Garfield                                  | 2,000              | 1,800   | 1,700   | 1,700   | 1,700   | 1,700   | 1,700   | 1,700   | 1,700   | 1,600   | 1,600   | 32               |
| McCone                                    | 3,300              | 2,900   | 2,700   | 2,700   | 2,700   | 2,800   | 2,700   | 2,600   | 2,600   | 2,600   | 2,500   | 44               |
| Prairie                                   | 2,300              | 1,800   | 1,900   | 1,800   | 1,900   | 1,900   | 1,900   | 1,900   | 1,800   | 1,700   | 1,600   | 51               |
| Richtland                                 | 10,600             | 9,900   | 11,700  | 12,500  | 13,600  | 14,900  | 14,700  | 14,300  | 13,900  | 13,000  | 12,100  | 13               |
| Wibaux                                    | 1,700              | 1,500   | 1,600   | 1,500   | 1,600   | 1,600   | 1,500   | 1,500   | 1,400   | 1,300   | 1,300   | 53               |
| <b>Total Jobs /b</b>                      |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | ...                | 13,765  | 16,707  | 17,608  | 19,071  | 18,206  | 16,851  | 17,121  | 16,623  | 15,527  | ...     | 10               |
| Dawson                                    | ...                | 5,405   | 6,345   | 6,605   | 7,020   | 6,956   | 6,423   | 6,304   | 4,010   | 5,720   | ...     | 16               |
| Garfield                                  | ...                | 961     | 878     | 869     | 866     | 894     | 911     | 907     | 901     | 905     | ...     | 31               |
| McCone                                    | ...                | 1,468   | 1,402   | 1,379   | 1,370   | 1,397   | 1,366   | 1,326   | 1,248   | 1,310   | ...     | 44               |
| Prairie                                   | ...                | 646     | 907     | 937     | 813     | 811     | 803     | 805     | 814     | 816     | ...     | 52               |
| Richtland                                 | ...                | 4,302   | 6,376   | 7,140   | 6,313   | 7,470   | 6,703   | 7,121   | 6,760   | 6,115   | ...     | 14               |
| Wibaux                                    | ...                | 661     | 699     | 678     | 667     | 678     | 603     | 658     | 650     | 655     | ...     | 53               |
| <b>Wage &amp; Salary Jobs /b</b>          |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | ...                | 9,102   | 12,576  | 13,338  | 14,688  | 13,727  | 12,212  | 12,364  | 11,523  | 10,444  | ...     | 10               |
| Dawson                                    | ...                | 4,147   | 5,126   | 5,350   | 5,709   | 5,386   | 4,995   | 4,813   | 4,462   | 4,102   | ...     | 17               |
| Garfield                                  | ...                | 500     | 511     | 513     | 505     | 529     | 334     | 527     | 516     | 516     | ...     | 50               |
| McCone                                    | ...                | 739     | 890     | 635     | 820     | 860     | 794     | 764     | 721     | 739     | ...     | 43               |
| Prairie                                   | ...                | 472     | 587     | 619     | 497     | 481     | 471     | 469     | 469     | 459     | ...     | 51               |
| Richtland                                 | ...                | 2,915   | 4,862   | 5,054   | 6,783   | 5,922   | 5,086   | 5,467   | 5,044   | 4,323   | ...     | 13               |
| Wibaux                                    | ...                | 329     | 360     | 367     | 374     | 347     | 332     | 322     | 311     | 307     | ...     | 53               |
| <b>Unemployment Rate /c</b>               |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | ...                | 2.9%    | 2.7%    | 2.6%    | 2.8%    | 6.7%    | 9.4%    | 5.6%    | 5.7%    | 2.3%    | 6.8%    | 3                |
| Dawson                                    | ...                | 2.9%    | 3.4%    | 3.0%    | 3.2%    | 6.9%    | 10.0%   | 5.3%    | 4.9%    | 5.5%    | 6.1%    | 19               |
| Garfield                                  | ...                | 1.6%    | 6.7%    | 3.1%    | 1.9%    | 2.6%    | 3.3%    | 2.7%    | 3.6%    | 3.4%    | ...     | 2                |
| McCone                                    | ...                | 1.9%    | 1.7%    | 1.7%    | 1.9%    | 3.5%    | 6.1%    | 5.1%    | 5.1%    | 3.6%    | 2.8%    | 1                |
| Prairie                                   | ...                | 3.0%    | 2.7%    | 2.7%    | 4.6%    | 5.12    | 6.2%    | 6.5%    | 5.48    | 6.0%    | 3.0%    | 16               |
| Richtland                                 | ...                | 3.4%    | 1.9%    | 2.3%    | 2.3%    | 7.6%    | 10.4%   | 9.01    | 4.7%    | 10.4%   | 9.1%    | 43               |
| Wibaux                                    | ...                | 3.2%    | 3.0%    | 2.6%    | 4.0%    | 8.0%    | 15.2%   | 9.3%    | 8.0%    | 6.9%    | 5.4%    | 13               |
| <b>Total Personal Income (\$1000s) /b</b> |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 170,238            | 277,155 | 380,608 | 417,727 | 474,127 | 437,733 | 393,421 | 368,355 | 365,250 | 383,087 | 362,000 | 10               |
| Dawson                                    | 69,129             | 105,823 | 153,279 | 161,885 | 175,968 | 170,063 | 153,808 | 148,460 | 158,942 | 157,710 | ...     | 16               |
| Garfield                                  | 10,167             | 24,675  | 21,301  | 20,232  | 25,090  | 20,168  | 17,713  | 15,862  | 14,485  | 23,399  | ...     | 50               |
| McCone                                    | 13,474             | 27,946  | 29,024  | 33,445  | 36,367  | 32,990  | 27,058  | 27,100  | 24,373  | 33,092  | ...     | 44               |
| Prairie                                   | 12,671             | 14,666  | 19,655  | 21,533  | 21,016  | 17,882  | 16,994  | 17,865  | 16,327  | 19,278  | ...     | 32               |
| Richtland                                 | 53,457             | 69,916  | 141,514 | 163,719 | 196,914 | 180,299 | 163,231 | 163,911 | 157,893 | 154,296 | ...     | 14               |
| Wibaux                                    | 11,340             | 14,148  | 15,634  | 16,912  | 18,795  | 16,351  | 14,618  | 15,330  | 13,030  | 14,812  | ...     | 53               |
| <b>Per Capita Personal Income /b</b>      |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 5,337              | 9,451   | 12,071  | 13,003  | 14,078  | 12,288  | 11,175  | 11,389  | 11,013  | 12,336  | 12,200  | 6                |
| Dawson                                    | 5,066              | 9,304   | 12,897  | 13,607  | 14,374  | 13,330  | 12,161  | 12,219  | 11,808  | 12,647  | ...     | 12               |
| Garfield                                  | 5,083              | 13,594  | 12,263  | 12,190  | 15,078  | 12,050  | 10,475  | 9,127   | 8,571   | 14,408  | ...     | 32               |
| McCone                                    | 4,083              | 9,375   | 10,706  | 12,364  | 13,414  | 11,884  | 9,650   | 10,285  | 9,472   | 12,922  | ...     | 34               |
| Prairie                                   | 5,509              | 8,117   | 10,586  | 11,691  | 11,298  | 9,417   | 8,907   | 9,646   | 9,171   | 11,957  | ...     | 66               |
| Richtland                                 | 5,140              | 9,002   | 12,046  | 13,068  | 14,433  | 12,067  | 11,112  | 11,501  | 11,338  | 11,848  | ...     | 22               |
| Wibaux                                    | 4,670              | 9,490   | 9,933   | 11,319  | 12,049  | 10,362  | 9,440   | 10,310  | 9,268   | 11,367  | ...     | 60               |
| <b>Net Farm Earnings (\$1000s) /b</b>     |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 110,032            | 152,773 | 253,861 | 275,791 | 310,684 | 282,506 | 241,024 | 247,586 | 230,754 | 204,665 | 187,000 | 10               |
| Dawson                                    | 34,330             | 73,006  | 112,582 | 113,864 | 120,469 | 119,617 | 105,683 | 101,594 | 94,476  | 85,670  | ...     | 16               |
| Garfield                                  | 3,481              | 5,104   | 5,717   | 5,433   | 5,174   | 5,405   | 5,586   | 5,672   | 5,563   | 5,569   | ...     | 51               |
| McCone                                    | 9,394              | 10,120  | 13,420  | 12,651  | 11,542  | 12,562  | 11,797  | 11,446  | 11,121  | 11,035  | ...     | 46               |
| Prairie                                   | 5,256              | 4,882   | 7,546   | 9,920   | 9,932   | 9,918   | 9,912   | 9,874   | 9,755   | 9,844   | ...     | 50               |
| Richtland                                 | 31,399             | 56,270  | 108,346 | 125,351 | 133,562 | 133,234 | 106,040 | 117,360 | 108,504 | 91,219  | ...     | 15               |
| Wibaux                                    | 6,175              | 9,392   | 6,262   | 6,568   | 6,024   | 5,787   | 5,304   | 5,613   | 5,328   | 5,127   | ...     | 53               |
| <b>Farm Earnings (\$1000s) /b</b>         |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 27,814             | 72,569  | 26,152  | 31,956  | 50,813  | 26,322  | 10,147  | 8,734   | 4,492   | 43,861  | 42,000  | 3                |
| Dawson                                    | 3,581              | 14,430  | 5,343   | 6,272   | 9,411   | 4,552   | 1,495   | 1,176   | 661     | 7,360   | ...     | 25               |
| Garfield                                  | 4,617              | 16,112  | 9,010   | 7,860   | 12,462  | 4,666   | 3,968   | 2,128   | 420     | 9,281   | ...     | 18               |
| McCone                                    | 1,532              | 13,090  | 4,967   | 10,400  | 13,406  | 4,925   | 3,573   | 4,044   | 1,897   | 10,332  | ...     | 16               |
| Prairie                                   | 4,069              | 5,316   | 4,409   | 2,650   | 4,625   | 1,324   | 398     | 1,309   | 419     | 3,678   | ...     | 43               |
| Richtland                                 | 11,099             | 18,468  | 801     | 3,113   | 6,537   | 4,303   | 999     | (L)     | 1,954   | 12,742  | ...     | 9                |
| Wibaux                                    | 2,316              | 5,127   | 1,041   | 1,461   | 2,372   | 352     | (487)   | (L)     | (859)   | 1,787   | ...     | 52               |
| <b>Property Income (\$1000s) /b</b>       |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 22,013             | 34,526  | 65,664  | 68,733  | 77,139  | 83,777  | 84,961  | 86,270  | 84,366  | 84,153  | 83,000  | 9                |
| Dawson                                    | 7,951              | 12,466  | 22,818  | 23,843  | 26,765  | 30,247  | 27,955  | 28,259  | 27,290  | 27,273  | ...     | 16               |
| Garfield                                  | 1,365              | 2,256   | 4,169   | 4,239   | 4,692   | 5,264   | 5,158   | 3,176   | 5,254   | 5,220   | ...     | 51               |
| McCone                                    | 2,172              | 3,340   | 7,948   | 7,690   | 7,766   | 7,828   | 7,490   | 7,881   | 7,567   | 7,499   | ...     | 45               |
| Prairie                                   | 1,491              | 2,238   | 4,227   | 4,786   | 3,639   | 3,667   | 3,823   | 3,647   | 3,687   | 3,632   | ...     | 50               |
| Richtland                                 | 7,140              | 12,035  | 23,399  | 23,015  | 28,611  | 30,896  | 33,977  | 34,535  | 34,338  | 34,507  | ...     | 14               |
| Wibaux                                    | 1,894              | 2,189   | 3,104   | 3,382   | 3,869   | 3,875   | 4,328   | 4,573   | 4,040   | 4,024   | ...     | 53               |
| <b>Transfer Payments (\$1000s) /b</b>     |                    |         |         |         |         |         |         |         |         |         |         |                  |
| Region                                    | 13,727             | 25,512  | 46,958  | 47,940  | 49,052  | 54,468  | 59,983  | 39,107  | 39,538  | 61,514  | 62,000  | 10               |
| Dawson                                    | 5,376              | 9,926   | 17,795  | 18,456  | 18,444  | 20,214  | 22,922  | 22,771  | 21,704  | 22,345  | ...     | 21               |
| Garfield                                  | 916                | 1,319   | 2,439   | 2,637   | 2,643   | 2,713   | 2,975   | 2,986   | 3,376   | 3,507   | ...     | 51               |
| McCone                                    | 1,324              | 1,921   | 3,204   | 3,225   | 3,804   | 4,211   | 4,647   | 4,394   | 4,482   | 4,617   | ...     | 48               |
| Prairie                                   | 1,188              | 2,180   | 3,209   | 3,599   | 3,989   | 3,899   | 4,017   | 4,168   | 4,193   | 4,297   | ...     | 49               |
| Richtland                                 | 5,934              | 8,353   | 15,834  | 16,880  | 17,320  | 20,002  | 22,142  | 21,552  | 22,620  | 23,459  | ...     | 18               |
| Wibaux                                    | 968                | 1,413   | 2,473   | 2,963   | 2,453   | 2,927   | 3,200   | 3,275   | 3,205   | 3,311   | ...     | 32               |

/a U.S. Bureau of the Census

/b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1989 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/e 1987 data consists of preliminary estimates.

| INDUSTRY                                            | SIC**<br>CODE | 1986  | 1987  | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|-------|-------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 8,385 | 7,783 | (602)  | -7.2%             |
| Total Private                                       |               | 6,266 | 5,739 | (527)  | -8.4%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 45    | "0"   | "0"    | "0"               |
| Agricultural Production--Crops ***                  | D1            | 7     | "0"   | "0"    | "0"               |
| Agricultural Production--Livestock ***              | D2            | 29    | 17    | (12)   | -41.4%            |
| Agricultural Services                               | D7            | 8     | 8     | 0      | 0.0%              |
| Forestry                                            | D8            |       |       |        |                   |
| Fishing, Hunting, and Trapping                      | D9            |       |       |        |                   |
| Mining                                              |               | 704   | 578   | (126)  | -17.9%            |
| Metal Mining                                        | 10            |       |       |        |                   |
| Coal Mining                                         | 12            | "0"   | "0"   | "0"    | "0"               |
| Oil and Gas Extraction                              | 13            | 679   | 556   | (123)  | -18.1%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | "0"   | "0"   | "0"    | "0"               |
| Construction                                        |               | 353   | 246   | (107)  | -30.3%            |
| General Building Contractors                        | 15            | 44    | 35    | (9)    | -20.5%            |
| Heavy Construction Contractors                      | 16            | 208   | 126   | (82)   | -39.4%            |
| Special Trade Contractors                           | 17            | 98    | 80    | (18)   | -18.4%            |
| Manufacturing                                       |               | 457   | 436   | (21)   | -4.6%             |
| Food and Kindred Products                           | 20            | 324   | 309   | (15)   | -4.6%             |
| Textile Mill Products                               | 22            |       |       |        |                   |
| Apparel and Other Textile Products                  | 23            |       |       |        |                   |
| Lumber and Wood Products                            | 24            | "0"   | "0"   | "0"    | "0"               |
| Furniture and Fixtures                              | 25            | "0"   | "0"   | "0"    | "0"               |
| Paper and Allied Products                           | 26            |       |       |        |                   |
| Printing and Publishing                             | 27            | 58    | 51    | (7)    | -12.1%            |
| Chemicals and Allied Products                       | 28            | "0"   | "0"   | "0"    | "0"               |
| Petroleum Refining and Related Industries           | 29            |       |       |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            |       |       |        |                   |
| Leather and Leather Products                        | 31            | "0"   | "0"   | "0"    | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | "0"   | "0"   | "0"    | "0"               |
| Primary Metals Processing                           | 33            |       |       |        |                   |
| Fabricated Metal Products                           | 34            |       |       |        |                   |
| Machinery, Except Electrical                        | 35            | "0"   | "0"   | "0"    | "0"               |
| Electrical and Electronic Equipment                 | 36            |       |       |        |                   |
| Transportation Equipment                            | 37            |       |       |        |                   |
| Instruments and Related Products                    | 38            |       |       |        |                   |
| Miscellaneous Manufacturing Industries              | 39            |       |       |        |                   |
| Transportation and Public Utilities                 | E             | 749   | 662   | (87)   | -11.6%            |
| Local and Interurban Passenger Transit              | 41            | 19    | 24    | 5      | 26.3%             |
| Trucking and Warehousing                            | 42            | 250   | 205   | (45)   | -18.0%            |
| Water Transportation                                | 44            |       |       |        |                   |
| Transportation by Air                               | 45            | "0"   | "0"   | "0"    | "0"               |
| Pipelines, Except Natural Gas                       | 46            |       |       |        |                   |
| Transportation Services                             | 47            | 8     | 6     | (2)    | -25.0%            |
| Communications                                      | 48            | 185   | 144   | (41)   | -22.2%            |
| Electric, Gas, and Sanitary Services                | 49            | 287   | 283   | (4)    | -1.4%             |
| Wholesale Trade                                     |               | 440   | 424   | (16)   | -3.6%             |
| Durable Goods                                       | 50            | 244   | 223   | (21)   | -8.6%             |
| Non-durable Goods                                   | 51            | 193   | 197   | 4      | 2.1%              |
| Retail Trade                                        |               | 1,686 | 1,586 | (100)  | -5.9%             |
| Building Materials and Hardware                     | 52            | 74    | 77    | 3      | 4.1%              |
| General Merchandise Stores                          | 53            | 180   | 141   | (39)   | -21.7%            |
| Food Stores                                         | 54            | 299   | 288   | (11)   | -3.7%             |
| Automotive Dealers and Service Stations             | 55            | 288   | 266   | (22)   | -7.6%             |
| Apparel and Accessory Stores                        | 56            | 63    | 57    | (6)    | -9.5%             |
| Furniture and Home Furnishings Stores               | 57            | 71    | 51    | (20)   | -28.2%            |
| Eating and Drinking Places                          | 58            | 531   | 524   | (7)    | -1.3%             |
| Miscellaneous Retail                                | 59            | 166   | 173   | 7      | 4.2%              |
| Finance, Insurance, and Real Estate                 |               | 391   | 383   | (8)    | -2.0%             |
| Banking                                             | 60            | 236   | 221   | (15)   | -6.4%             |
| Credit Agencies other than Banks                    | 61            | 46    | 42    | (4)    | -8.7%             |
| Security, Commodity Brokers, and Services           | 62            | "0"   | 5     | "0"    | "0"               |
| Insurance Carriers                                  | 63            | "0"   | "0"   | "0"    | "0"               |
| Insurance Agents, Brokers, and Services             | 64            | 43    | 42    | (1)    | -2.3%             |
| Real Estate                                         | 65            | 51    | 59    | 8      | 15.7%             |
| Combined Real Estate, Insurance, Etc.               | 66            |       |       |        |                   |
| Holding and Other Investment Offices                | 67            | "0"   | "0"   | "0"    | "0"               |
| Services                                            |               | 1,415 | 1,364 | (51)   | -3.6%             |
| Hotels and Other Lodging Places                     | 70            | 191   | 128   | (63)   | -33.0%            |
| Personal Services                                   | 72            | 95    | 88    | (7)    | -7.4%             |
| Business Services                                   | 73            | 78    | 51    | (27)   | -34.6%            |
| Auto Repair, Services, and Garages                  | 75            | 41    | 36    | (5)    | -12.2%            |
| Miscellaneous Repair Services                       | 76            | 39    | 31    | (8)    | -20.5%            |
| Motion Pictures                                     | 78            | 17    | 15    | (2)    | -11.8%            |
| Amusement and Recreation Services                   | 79            | 49    | 57    | 8      | 16.3%             |
| Private Health Services                             | 80            | 652   | 699   | 47     | 7.2%              |
| Legal Services                                      | 81            | 42    | 37    | (5)    | -11.9%            |
| Private Educational Services                        | 82            | "0"   | "0"   | "0"    | "0"               |
| Private Social Services                             | 83            | 33    | 34    | 1      | 3.0%              |
| Museums, Art Galleries, Etc.                        | 84            | "0"   | "0"   | "0"    | "0"               |
| Membership Organizations including Tribal Gov't     | 86            | 78    | 83    | 5      | 6.4%              |
| Private Households                                  | 88            | "0"   | 6     | "0"    | "0"               |
| Engineering, Accounting, and Other Services         | 89            | 64    | 67    | 3      | 4.7%              |
| Non-Classifiable                                    | 99            | "0"   | "0"   | "0"    | "0"               |
| Government                                          |               | 2,116 | 2,041 | (75)   | -3.5%             |
| State                                               |               | 320   | 303   | (17)   | -5.3%             |
| Local                                               |               | 1,625 | 1,551 | (74)   | -4.6%             |
| Federal                                             |               | 166   | 183   | 17     | 10.2%             |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.32

## UNEMPLOYMENT RATE -- GLENDALE - SIDNEY REG

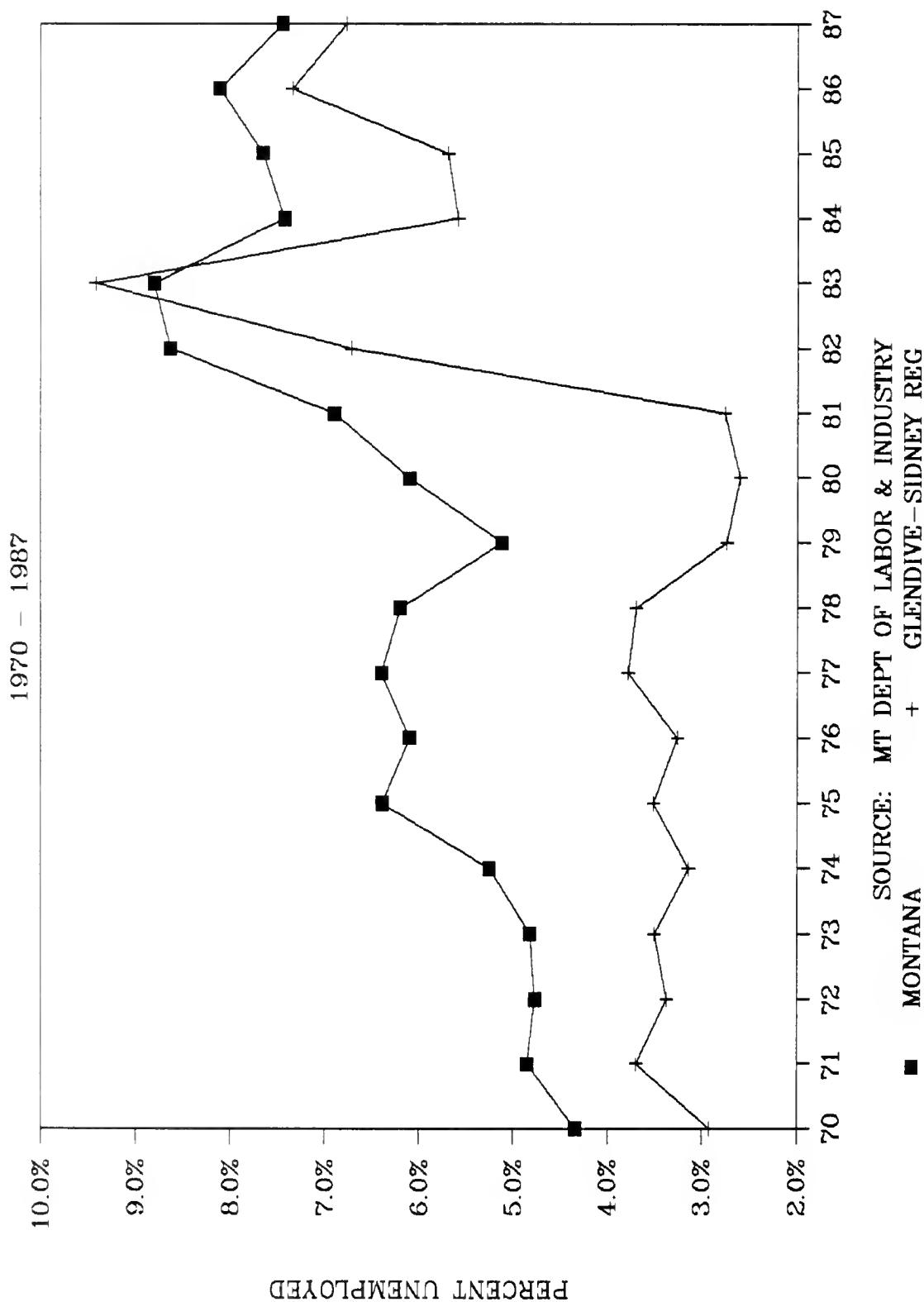
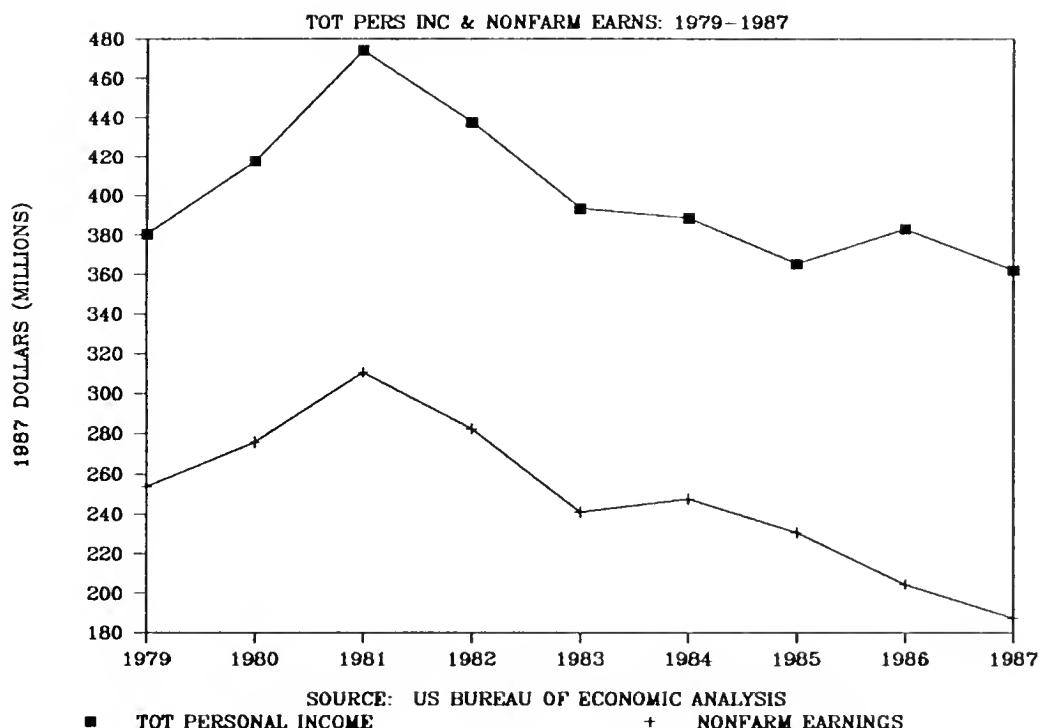
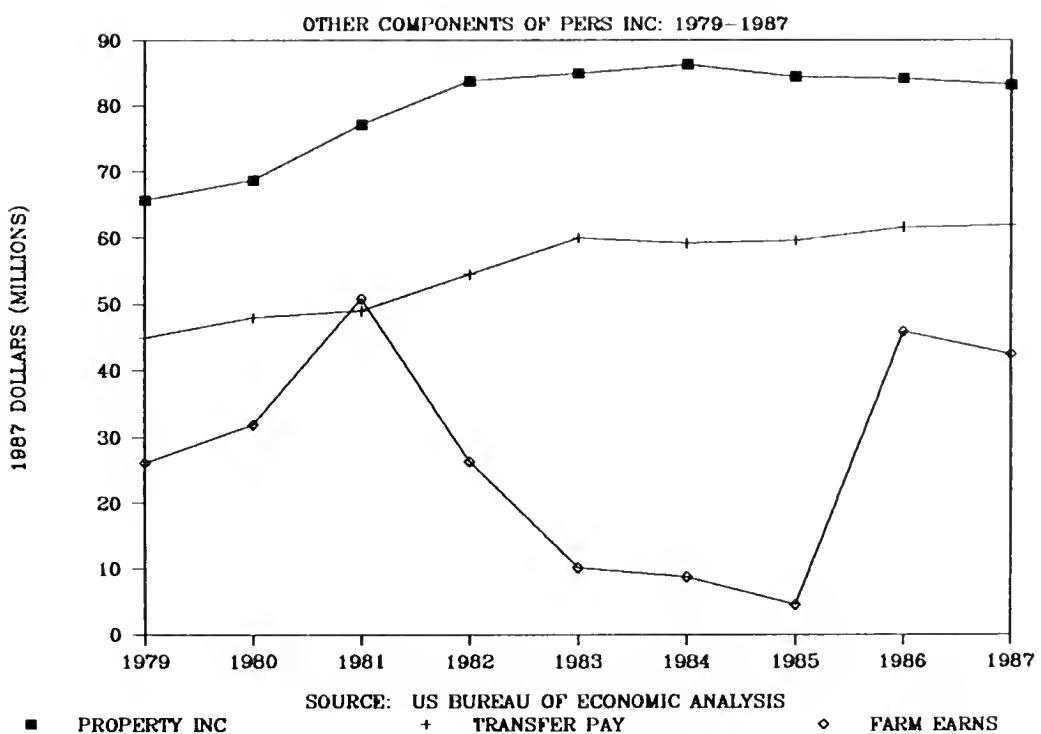


Figure 2.33

### INCOME -- GLENDIVE-SIDNEY REGION



### INCOME -- GLENDIVE-SIDNEY REGION



## The Great Falls Region

The Great Falls Region of north central Montana includes Cascade, Chouteau, Glacier, Pondera, Teton, and Toole counties.

### Labor Force

In 1986, the Great Falls Region ranked second in the state in both total and wage/salary jobs (Table 2.28). The region's 59,090 jobs accounted for 15 percent of the state's total jobs, down from the 1969 figure of 18 percent. Approximately 70 percent of the jobs were located in Cascade County, the state's second largest county in both population and total jobs.

Between 1969 and 1979, the region's strong growth in total jobs followed that of the state, with jobs declining only in 1975 when the state experienced essentially no job growth (Figure 2.34). Jobs decline in the region in 1975 was caused by a decline in federal jobs (both military and civilian in Cascade County). A general decline in both total and wage/salary jobs began in 1979, however, while statewide job growth only slowed. Again, the regional decline was related to a decrease in federal jobs at Malmstrom Air Force Base in Cascade County. Between 1982 and 1986, steadfast growth in the number of self-employed was a key factor in sustaining slight growth in total regional jobs. Wage/salary jobs remained constant for most of the 1982-1986 period except for a sharp decline in 1985 (Figure 2.34). More recently, in 1987, wage/salary jobs also improved (Table 2.29).

A shift away from traditional goods-producing industries toward the service oriented sectors characterized the industries of the region between 1969 and 1986. Shares of total jobs in farming, manufacturing, construction, and mining all declined during this period. At the same time, the combined share of services, retail trade, finance/insurance/real estate and wholesale trade increased from 42 percent to 54 percent of wage/salary employment. A substantial decline in government's share of total jobs from 27 percent to 22 percent also took place, most of which represented a decline in military personnel.

Job growth was strong between 1969 and 1979, with only agriculture, manufacturing, and railroads posting declines. Closure of a zinc processing facility in 1973 primarily was responsible for the decrease in manufacturing jobs. These declines, however, were more than offset by strong performance in private health and social services, wholesale trade, retail trade (particularly eating/drinking places), finance/insurance/real estate, and construction.

The large decline in wage/salary jobs that began in 1979 was felt throughout the region. Between 1979 and 1986, every major economic sector (except agriculture) experienced a decline in wage/salary employment. Gains during the 1970s in construction and oil/gas extraction were eliminated. Declines in manufacturing and railroad transportation continued from the 1970s, and the withdrawal of federal government employees (primarily military) cost the region over 1,000 jobs. Losses in wholesale and retail trade were sizable,

and services and finance/insurance/real estate declined slightly.

Table 2.29 illustrates the recent recovery in many sectors of wage/salary employment between 1986 and 1987. Declines in construction, oil/gas extraction, and membership organizations (mainly tribal government) have been offset by gains in services (particularly private health services) and in retail trade (general merchandise stores and automotive dealers/service stations). Based on yearly averages, wage/salary employment grew by 84 jobs between 1986 and 1987. Because of stronger recovery over the course of 1987, however, these averages underestimate the recent recovery. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs increased by almost 400.

With an unemployment rate of 7.7 percent in 1987, slightly above the statewide average of 7.4 percent, the Great Falls Region ranked ninth in the state. Most of the counties in the region ranked somewhere in the middle of the range, with the exception of Glacier County with high unemployment on the Blackfeet Indian Reservation. Figure 2.36 illustrates the close relationship that has prevailed between the region's unemployment rate and that of the state.

### Population

Dominated by the large population of Cascade County, the Great Falls Region ranked second, with a population in 1987 of more than 112,000. This relatively large population resulted from strong growth every decade between 1890 and 1970 (Table 2.8). In 1969, the region was the state's largest, but a general decline in population between 1969 and 1986 of 4 percent (third lowest growth rate in the state) while the rest of the state grew at an average of 17 percent ranked the region second to the Billings Region. Figure 2.35 displays the region's sporadic population performance since 1969.

### Income

The Great Falls Region retained its second-place rank in 1986 for total personal income. Its components also ranked second, with the exception of farm earnings, which ranked first in the state. Cascade County ranked second among counties in total personal income, and Chouteau County ranked first in farm earnings.

Changes in total personal income and its components basically have followed statewide trends in the 1980s, as shown in Figures 2.37 and 2.11. The major difference was the relatively stronger declines in farm earnings between 1981 and 1985. Between 1979 and 1986, total personal income declined slightly by about 1 percent (Table 2.28). In fact, this small decline is misleading because 1986 was an exceptional year for growth in agriculture (note the 28 percent growth in personal income for Chouteau County during this period).

Much of this overall decline was the result of a decline in nonfarm earnings between 1979 and 1987 that was related to the losses of wage/salary jobs. At the same time, total personal income during this period reflected fluctuations

in farm earnings. Between 1979 and 1982, dramatic declines in nonfarm earnings occurred before a very small recovery occurred in 1983 and 1984. Also, farm earnings declined sharply after peaking in 1981. As a result, total personal income declined through 1985. Strong recovery in farm earnings in 1986 pushed total personal income up once again despite the continued decline in nonfarm earnings. In 1987, however, farm earnings remained relatively unchanged along with total personal income. During this entire period, property income and transfer payments followed statewide trends and increased moderately.

The Great Falls Region ranked third in the state in per capita income for the 1982-1986 period, a very high ranking considering agriculture's unstable performance. Cascade County ranked fourth among counties, and Toole County ranked eighth. These two counties and the entire region were consistently above the state average for per capita income between 1979 and 1986. Other counties in this region were generally below the state average, although in exceptionally good agricultural years this did not hold true (Table 2.29).

Agriculture's influence on this region is evident in per capita income, which increased with farm earnings between 1979 and 1981, and then declined steadily until 1985. The sharp increase in farm earnings in 1986 also was reflected in per capita income which was at its highest level of the 1980s in 1986, about 109 percent of the statewide average.

Figure 2.34

## EMPLOYMENT--GREAT FALLS REGION

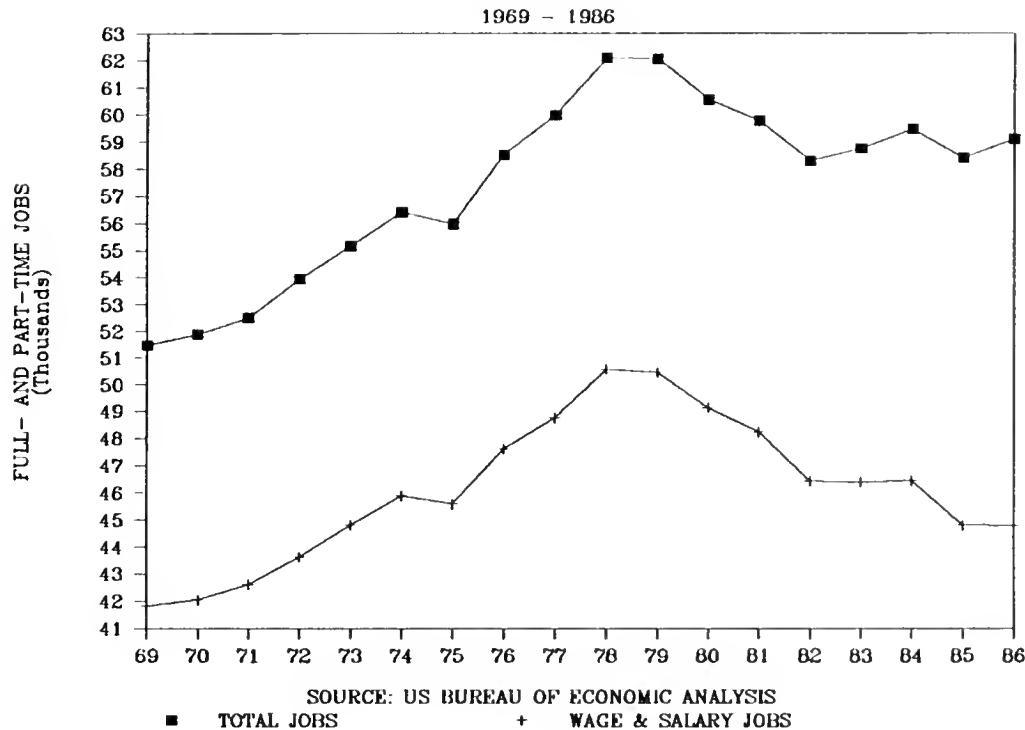


Figure 2.35

## POPULATION--GREAT FALLS REGION

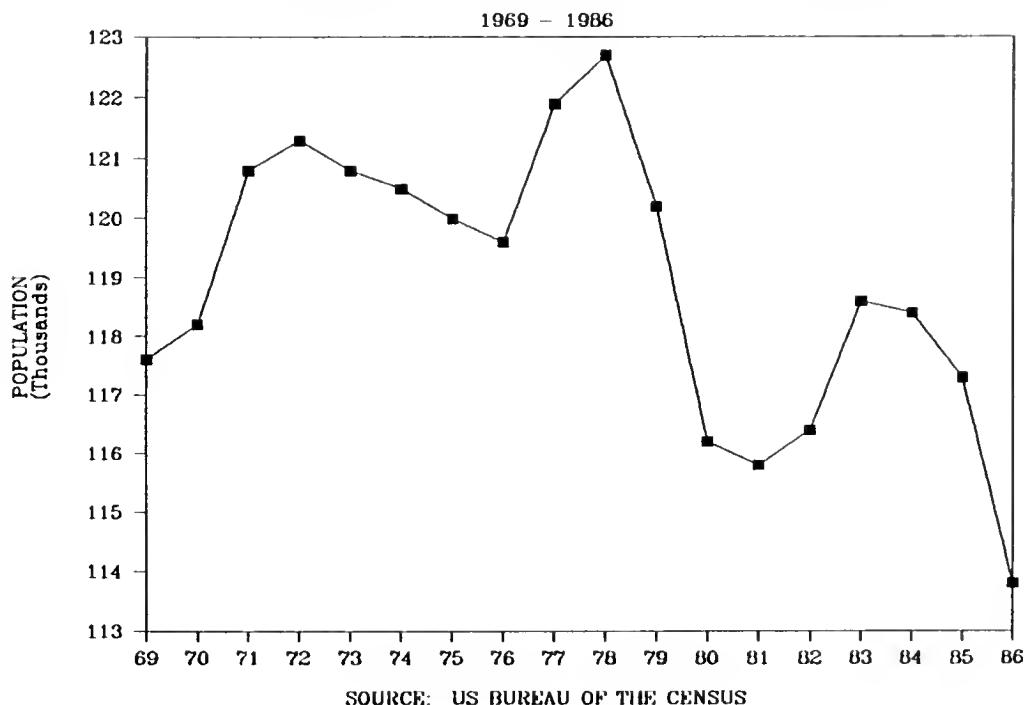


Table 2.28

The Great Falls Region

|                                           | 1959    | 1969      | 1979      | 1980      | 1981      | 1982      | 1983      | 1984      | 1985      | 1986      | 1987 /p   | Rank in State /d |
|-------------------------------------------|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------------|
| <b>Population /a</b>                      |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 114,200 | 117,600   | 120,200   | 116,200   | 115,800   | 116,400   | 118,600   | 118,400   | 117,300   | 113,800   | 112,900   | 2                |
| Cascade                                   | 72,800  | 81,200    | 84,500    | 80,600    | 80,200    | 80,200    | 81,600    | 81,400    | 80,800    | 78,500    | 78,100    | 3                |
| Chouteau                                  | 7,300   | 6,600     | 6,100     | 6,100     | 4,000     | 8,100     | 8,200     | 8,200     | 6,100     | 5,900     | 5,800     | 32               |
| Glacier                                   | 11,500  | 10,900    | 10,400    | 10,700    | 10,800    | 11,100    | 11,200    | 11,400    | 11,300    | 11,100    | 11,200    | 19               |
| Pondera                                   | 7,600   | 4,700     | 6,900     | 6,700     | 6,700     | 6,900     | 7,000     | 7,000     | 4,900     | 6,700     | 4,600     | 29               |
| Teton                                     | 7,200   | 4,200     | 4,800     | 6,500     | 6,500     | 6,400     | 4,700     | 8,600     | 6,500     | 8,200     | 4,100     | 30               |
| Toole                                     | 7,600   | 4,000     | 5,500     | 5,600     | 5,600     | 5,700     | 5,900     | 5,800     | 5,700     | 5,400     | 5,200     | 36               |
| <b>Total Jobs /b</b>                      |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | ...     | 51,476    | 62,059    | 60,557    | 59,770    | 58,293    | 58,748    | 59,466    | 58,402    | 59,090    | ...       | 2                |
| Cascade                                   | ...     | 36,239    | 43,584    | 42,249    | 41,551    | 40,546    | 40,912    | 41,578    | 40,908    | 41,316    | ...       | 2                |
| Chouteau                                  | ...     | 3,043     | 2,919     | 2,807     | 2,892     | 2,842     | 2,885     | 2,841     | 2,775     | 2,855     | ...       | 33               |
| Glacier                                   | ...     | 4,079     | 6,002     | 4,052     | 5,667     | 5,474     | 5,502     | 5,483     | 5,305     | 5,333     | ...       | 19               |
| Pondera                                   | ...     | 2,611     | 3,281     | 3,216     | 3,222     | 3,159     | 3,233     | 3,208     | 3,174     | 3,157     | ...       | 27               |
| Teton                                     | ...     | 2,692     | 2,932     | 2,930     | 3,106     | 3,076     | 3,039     | 3,103     | 3,002     | 3,026     | ...       | 30               |
| Toole                                     | ...     | 2,792     | 3,341     | 3,303     | 3,332     | 3,196     | 3,177     | 3,253     | 3,238     | 3,205     | ...       | 26               |
| <b>Wage &amp; Salary Jobs /b</b>          |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | ...     | 41,817    | 50,464    | 49,141    | 48,237    | 46,442    | 46,400    | 46,448    | 46,804    | 44,799    | ...       | 2                |
| Cascade                                   | ...     | 32,211    | 37,499    | 36,136    | 35,325    | 33,992    | 34,086    | 34,230    | 33,131    | 33,257    | ...       | 2                |
| Chouteau                                  | ...     | 1,458     | 1,656     | 1,620     | 1,687     | 1,656     | 1,657     | 1,583     | 1,490     | 1,543     | ...       | 35               |
| Glacier                                   | ...     | 3,285     | 4,984     | 5,018     | 4,632     | 4,624     | 4,420     | 4,374     | 4,151     | 4,120     | ...       | 16               |
| Pondera                                   | ...     | 1,542     | 2,279     | 2,247     | 2,301     | 2,242     | 2,291     | 2,266     | 2,210     | 2,161     | ...       | 26               |
| Teton                                     | ...     | 1,664     | 1,694     | 1,727     | 1,888     | 1,859     | 1,739     | 1,777     | 1,649     | 1,632     | ...       | 36               |
| Toole                                     | ...     | 1,857     | 2,350     | 2,393     | 2,404     | 2,271     | 2,227     | 2,218     | 2,167     | 2,086     | ...       | 27               |
| <b>Unemployment Rate /c</b>               |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | ...     | 4.0%      | 5.7%      | 6.6%      | 7.2%      | 8.0%      | 8.7%      | 7.5%      | 8.0%      | 8.0%      | 7.7%      | 9                |
| Cascade                                   | ...     | 4.1%      | 6.2%      | 7.3%      | 8.0%      | 8.4%      | 9.0%      | 7.3%      | 7.9%      | 7.7%      | 7.5%      | 33               |
| Chouteau                                  | ...     | 2.1%      | 2.2%      | 2.4%      | 2.1%      | 3.6%      | 4.8%      | 4.4%      | 5.7%      | 6.6%      | 5.5%      | 15               |
| Glacier                                   | ...     | 5.8%      | 7.8%      | 8.5%      | 12.1%     | 11.8%     | 11.4%     | 12.3%     | 12.0%     | 11.5%     | 11.9%     | 54               |
| Pondera                                   | ...     | 3.7%      | 3.7%      | 4.2%      | 5.3%      | 5.4%      | 4.3%      | 6.7%      | 6.8%      | 7.1%      | 7.3%      | 31               |
| Teton                                     | ...     | 2.8%      | 3.5%      | 3.8%      | 3.3%      | 5.3%      | 5.9%      | 6.8%      | 5.9%      | 5.9%      | 5.2%      | 11               |
| Toole                                     | ...     | 4.1%      | 4.0%      | 4.0%      | 3.5%      | 8.6%      | 8.0%      | 6.6%      | 7.3%      | 9.8%      | 8.7%      | 24               |
| <b>Total Personal Income (\$1000s) /b</b> |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 902,025 | 1,199,765 | 1,548,417 | 1,518,020 | 1,537,085 | 1,496,167 | 1,495,823 | 1,487,650 | 1,450,063 | 1,534,802 | 1,520,000 | 2                |
| Cascade                                   | 609,753 | 837,141   | 1,119,886 | 1,075,526 | 1,060,146 | 1,051,234 | 1,068,158 | 1,090,540 | 1,070,400 | 1,081,160 | ...       | 2                |
| Chouteau                                  | 65,118  | 79,776    | 67,672    | 67,624    | 91,524    | 81,965    | 76,925    | 66,425    | 64,113    | 60,062    | ...       | 26               |
| Glacier                                   | 66,446  | 88,278    | 135,232   | 139,793   | 131,837   | 129,220   | 124,277   | 120,117   | 116,012   | 127,556   | ...       | 17               |
| Pondera                                   | 53,697  | 68,109    | 74,506    | 77,955    | 85,224    | 80,788    | 76,963    | 71,308    | 65,074    | 81,788    | ...       | 28               |
| Teton                                     | 52,809  | 64,515    | 73,049    | 75,789    | 84,690    | 76,550    | 74,229    | 70,242    | 67,284    | 82,453    | ...       | 27               |
| Toole                                     | 54,200  | 61,948    | 78,273    | 81,333    | 83,665    | 76,404    | 75,265    | 68,999    | 67,113    | 75,785    | ...       | 32               |
| <b>Per Capita Personal Income /b</b>      |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 7,899   | 10,205    | 12,887    | 13,066    | 13,267    | 12,863    | 12,622    | 12,567    | 12,369    | 13,495    | 13,500    | 3                |
| Cascade                                   | 8,376   | 10,312    | 13,257    | 13,340    | 13,222    | 13,113    | 13,096    | 13,396    | 13,251    | 13,775    | ...       | 4                |
| Chouteau                                  | 8,920   | 12,154    | 11,001    | 11,111    | 15,138    | 13,341    | 12,316    | 10,788    | 10,582    | 14,604    | ...       | 13               |
| Glacier                                   | 5,778   | 8,111     | 13,029    | 13,102    | 12,199    | 11,076    | 11,064    | 10,512    | 10,262    | 11,465    | ...       | 30               |
| Pondera                                   | 7,065   | 10,149    | 10,861    | 11,562    | 12,686    | 11,765    | 11,070    | 10,200    | 9,485     | 12,249    | ...       | 31               |
| Teton                                     | 7,355   | 10,388    | 10,807    | 11,667    | 13,024    | 11,951    | 11,156    | 10,588    | 10,347    | 13,392    | ...       | 24               |
| Toole                                     | 6,949   | 10,297    | 14,144    | 14,599    | 14,919    | 13,482    | 12,859    | 11,977    | 11,733    | 14,050    | ...       | 8                |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 633,912 | 821,848   | 1,107,929 | 1,038,989 | 992,306   | 969,782   | 952,795   | 963,413   | 938,002   | 923,752   | 915,000   | 2                |
| Cascade                                   | 488,167 | 602,913   | 848,149   | 781,992   | 749,466   | 728,129   | 735,394   | 743,388   | 724,993   | 716,411   | ...       | 3                |
| Chouteau                                  | 17,007  | 17,086    | 25,098    | 23,596    | 24,400    | 22,458    | 22,023    | 20,877    | 20,641    | 21,174    | ...       | 39               |
| Glacier                                   | 50,553  | 61,614    | 110,881   | 112,442   | 97,812    | 89,427    | 86,325    | 89,171    | 84,175    | 80,400    | ...       | 18               |
| Pondera                                   | 27,589  | 23,740    | 37,800    | 36,047    | 35,379    | 34,620    | 35,642    | 36,219    | 37,256    | 35,841    | ...       | 28               |
| Teton                                     | 19,886  | 26,530    | 34,843    | 33,833    | 35,522    | 33,000    | 31,048    | 32,125    | 29,587    | 29,356    | ...       | 33               |
| Toole                                     | 30,711  | 32,166    | 51,157    | 51,039    | 49,726    | 41,949    | 41,960    | 41,036    | 41,310    | 40,372    | ...       | 27               |
| <b>Farm Earnings (\$1000s) /b</b>         |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 109,130 | 147,580   | 30,176    | 66,070    | 91,771    | 65,603    | 68,007    | 13,798    | (7,185)   | 86,203    | 81,000    | 1                |
| Cascade                                   | 19,978  | 29,954    | 13,973    | 15,743    | 9,244     | 7,022     | 9,349     | 11,669    | 1,363     | 16,805    | ...       | 4                |
| Chouteau                                  | 34,400  | 40,977    | 7,037     | 7,602     | 28,767    | 18,854    | 13,174    | 3,725     | 2,437     | 24,410    | ...       | 1                |
| Glacier                                   | 5,172   | 9,009     | 5,627     | 13,015    | 13,574    | 13,980    | 8,575     | 234       | (1,075)   | 12,284    | ...       | 10               |
| Pondera                                   | 14,377  | 26,820    | 5,275     | 8,471     | 13,566    | 8,307     | 3,596     | (4,100)   | (19,564)  | 8,306     | ...       | 22               |
| Teton                                     | 20,925  | 22,699    | 8,122     | 10,621    | 14,893    | 8,425     | 6,337     | 1,805     | 211       | 15,748    | ...       | 6                |
| Toole                                     | 14,077  | 18,120    | 9,942     | 10,617    | 11,747    | 8,810     | 6,976     | 467       | (757)     | 8,649     | ...       | 21               |
| <b>Property Income (\$1000s) /b</b>       |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 115,767 | 158,288   | 227,134   | 236,653   | 267,019   | 260,465   | 282,735   | 295,176   | 294,313   | 294,066   | 289,000   | 2                |
| Cascade                                   | 76,495  | 102,992   | 139,621   | 145,199   | 164,621   | 172,709   | 172,525   | 183,818   | 180,210   | 180,467   | ...       | 2                |
| Chouteau                                  | 10,392  | 13,926    | 23,266    | 23,894    | 26,605    | 26,985    | 27,371    | 26,564    | 25,845    | 25,713    | ...       | 20               |
| Glacier                                   | 8,136   | 8,703     | 14,355    | 14,143    | 15,468    | 18,294    | 18,615    | 19,374    | 19,061    | 19,666    | ...       | 26               |
| Pondera                                   | 8,102   | 12,241    | 17,690    | 18,996    | 21,480    | 22,037    | 22,416    | 23,471    | 21,841    | 21,739    | ...       | 21               |
| Teton                                     | 8,039   | 11,804    | 18,825    | 19,815    | 22,119    | 22,694    | 23,825    | 23,397    | 23,305    | 23,351    | ...       | 21               |
| Toole                                     | 4,582   | 8,621     | 13,379    | 14,605    | 16,727    | 17,945    | 17,982    | 18,349    | 17,452    | 17,330    | ...       | 29               |
| <b>Transfer Payments (\$1000s) /b</b>     |         |           |           |           |           |           |           |           |           |           |           |                  |
| Region                                    | 63,479  | 114,968   | 214,645   | 223,469   | 233,252   | 244,253   | 250,463   | 260,373   | 270,477   | 278,985   | 280,000   | 2                |
| Cascade                                   | 41,999  | 78,955    | 153,371   | 159,564   | 165,597   | 172,629   | 182,192   | 183,507   | 190,653   | 196,645   | ...       | 2                |
| Chouteau                                  | 3,899   | 4,501     | 9,745     | 10,625    | 11,115    | 12,078    | 12,112    | 12,212    | 12,296    | 12,433    | ...       | 34               |
| Glacier                                   | 6,343   | 12,399    | 20,706    | 21,580    | 22,104    | 22,656    | 24,412    | 25,604    | 26,573    | 27,266    | ...       | 16               |
| Pondera                                   | 3,829   | 5,966     | 11,033    | 11,077    | 12,165    | 13,140    | 13,278    | 13,793    | 14,566    | 14,884    | ...       | 30               |
| Teton                                     | 3,862   | 5,788     | 10,802    | 11,264    | 12,355    | 12,939    | 13,269    | 13,606    | 14,237    | 14,586    | ...       | 31               |
| Toole                                     | 4,246   | 5,561     | 8,987     | 9,559     | 9,916     | 10,811    | 11,622    | 11,652    | 12,353    | 12,971    | ...       | 32               |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/e 1987 data consists of preliminary estimates.

| INDUSTRY                                            | SIC**<br>CODE | 1986   | 1987   | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|--------|--------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 34,909 | 34,993 | 84     | 0.2%              |
| Total Private                                       |               | 26,772 | 26,783 | 11     | 0.0%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 390    | 381    | (9)    | -2.3%             |
| Agricultural Production--Crops ***                  | 01            | 117    | 110    | (7)    | -6.0%             |
| Agricultural Production--Livestock ***              | 02            | 131    | 117    | (14)   | -10.7%            |
| Agricultural Services                               | 07            | 139    | 151    | 12     | 8.6%              |
| Forestry                                            | 08            |        |        |        |                   |
| Fishing, Hunting, and Trapping                      | 09            |        |        |        |                   |
| Mining                                              |               | "0"    | 327    | "0"    | "0"               |
| Metal Mining                                        | 10            | "0"    | "0"    | "0"    | "0"               |
| Coal Mining                                         | 12            |        |        |        |                   |
| Oil and Gas Extraction                              | 13            | 399    | 323    | (76)   | -19.0%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | "0"    | "0"    | "0"    | "0"               |
| Construction                                        |               | 1,495  | 1,320  | (175)  | -11.7%            |
| General Building Contractors                        | 15            | 393    | 325    | (68)   | -17.3%            |
| Heavy Construction Contractors                      | 16            | 538    | 430    | (108)  | -20.1%            |
| Special Trade Contractors                           | 17            | 560    | 558    | (2)    | -0.4%             |
| Manufacturing                                       |               | 1,392  | 1,256  | (136)  | -9.8%             |
| Food and Kindred Products                           | 20            | 498    | 388    | (110)  | -22.1%            |
| Textile Mill Products                               | 22            |        |        |        |                   |
| Apparel and Other Textile Products                  | 23            | 17     | "0"    | "0"    | "0"               |
| Lumber and Wood Products                            | 24            | 18     | 42     | 24     | 133.3%            |
| Furniture and Fixtures                              | 25            | "0"    | "0"    | "0"    | "0"               |
| Paper and Allied Products                           | 26            | "0"    | "0"    | "0"    | "0"               |
| Printing and Publishing                             | 27            | 330    | 332    | 2      | 0.6%              |
| Chemicals and Allied Products                       | 28            | 75     | 82     | 7      | 9.3%              |
| Petroleum Refining and Related Industries           | 29            | "0"    | "0"    | "0"    | "0"               |
| Rubber and Miscellaneous Plastic Products           | 30            | 18     | 22     | 4      | 22.2%             |
| Leather and Leather Products                        | 31            | "0"    | "0"    | "0"    | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | 119    | 54     | (65)   | -54.6%            |
| Primary Metals Processing                           | 33            | "0"    | "0"    | "0"    | "0"               |
| Fabricated Metal Products                           | 34            | "0"    | "0"    | "0"    | "0"               |
| Machinery, Except Electrical                        | 35            | 9      | 8      | (1)    | -11.1%            |
| Electrical and Electronic Equipment                 | 36            |        |        |        |                   |
| Transportation Equipment                            | 37            | 38     | 46     | 8      | 21.1%             |
| Instruments and Related Products                    | 38            | "0"    | "0"    | "0"    | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | 66     | 75     | 9      | 13.6%             |
| Transportation and Public Utilities                 |               | 2,024  | "0"    | "0"    | "0"               |
| Local and Interurban Passenger Transit              | 41            | 178    | 175    | (3)    | -1.7%             |
| Trucking and Warehousing                            | 42            | 668    | 667    | (1)    | -0.1%             |
| Water Transportation                                | 44            |        | "0"    | "0"    | "0"               |
| Transportation by Air                               | 45            | 129    | 161    | 32     | 24.8%             |
| Pipelines, Except Natural Gas                       | 46            |        |        |        |                   |
| Transportation Services                             | 47            | 110    | 107    | (3)    | -2.7%             |
| Communications                                      | 48            | 396    | 379    | (17)   | -4.3%             |
| Electric, Gas, and Sanitary Services                | 49            | 535    | 519    | (16)   | -3.0%             |
| Wholesale Trade                                     |               | 2,310  | 2,315  | 5      | 0.2%              |
| Durable Goods                                       | 50            | 1,226  | 1,169  | (57)   | -4.6%             |
| Non-durable Goods                                   | 51            | 1,081  | 1,143  | 62     | 5.7%              |
| Retail Trade                                        |               | 7,711  | 7,802  | 91     | 1.2%              |
| Building Materials and Hardware                     | 52            | 334    | 303    | (31)   | -9.3%             |
| General Merchandise Stores                          | 53            | 1,077  | 1,206  | 129    | 12.0%             |
| Food Stores                                         | 54            | 1,244  | 1,210  | (34)   | -2.7%             |
| Automotive Dealers and Service Stations             | 55            | 977    | 1,034  | 57     | 5.8%              |
| Apparel and Accessory Stores                        | 56            | 394    | 384    | (10)   | -2.5%             |
| Furniture and Home Furnishings Stores               | 57            | 340    | 335    | (5)    | -1.5%             |
| Eating and Drinking Places                          | 58            | 2,524  | 2,522  | (2)    | -0.1%             |
| Miscellaneous Retail                                | 59            | 804    | 790    | (14)   | -1.7%             |
| Finance, Insurance, and Real Estate                 |               | 2,233  | 2,215  | (18)   | -0.8%             |
| Banking                                             | 60            | 631    | 602    | (29)   | -4.6%             |
| Credit Agencies other than Banks                    | 61            | 298    | 316    | 18     | 6.0%              |
| Security, Commodity Brokers, and Services           | 62            | 156    | 158    | 2      | 1.3%              |
| Insurance Carriers                                  | 63            | 383    | 380    | (3)    | -0.8%             |
| Insurance Agents, Brokers, and Services             | 64            | 333    | 333    | 0      | 0.0%              |
| Real Estate                                         | 65            | 375    | 383    | 8      | 2.1%              |
| Combined Real Estate, Insurance, Etc.               | 66            | 22     | 21     | (1)    | -4.5%             |
| Holding and Other Investment Offices                | 67            | 24     | 13     | (11)   | -45.8%            |
| Services                                            |               | 8,795  | 9,120  | 325    | 3.7%              |
| Hotels and Other Lodging Places                     | 70            | 1,077  | 1,103  | 26     | 2.4%              |
| Personal Services                                   | 72            | 435    | 420    | (15)   | -3.4%             |
| Business Services                                   | 73            | 671    | 689    | 18     | 2.7%              |
| Auto Repair, Services, and Garages                  | 75            | 268    | 268    | 0      | 0.0%              |
| Miscellaneous Repair Services                       | 76            | 71     | 78     | 7      | 9.9%              |
| Motion Pictures                                     | 78            | 96     | 91     | (5)    | -5.2%             |
| Amusement and Recreation Services                   | 79            | 296    | 322    | 26     | 8.8%              |
| Private Health Services                             | 80            | 3,183  | 3,404  | 221    | 6.9%              |
| Legal Services                                      | 81            | 316    | 355    | 39     | 12.3%             |
| Private Educational Services                        | 82            | 370    | 380    | 10     | 2.7%              |
| Private Social Services                             | 83            | 719    | 745    | 26     | 3.6%              |
| Museums, Art Galleries, Etc.                        | 84            | 29     | 35     | 6      | 20.7%             |
| Membership Organizations Including Tribal Gov't     | 86            | 789    | 683    | (106)  | -13.4%            |
| Private Households                                  | 88            | 60     | 50     | (10)   | -16.7%            |
| Engineering, Accounting, and Other Services         | 89            | 387    | 472    | 85     | 22.0%             |
| Non-Classifiable                                    | 99            | "0"    | "0"    | "0"    | "0"               |
| Government                                          |               | 8,135  | 8,206  | 71     | 0.9%              |
| State                                               |               | 709    | 686    | (23)   | -3.2%             |
| Local                                               |               | 5,153  | 5,177  | 24     | 0.5%              |
| Federal                                             |               | 2,269  | 2,340  | 71     | 3.1%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"D" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.36

## UNEMPLOYMENT RATE--GREAT FALLS REGION

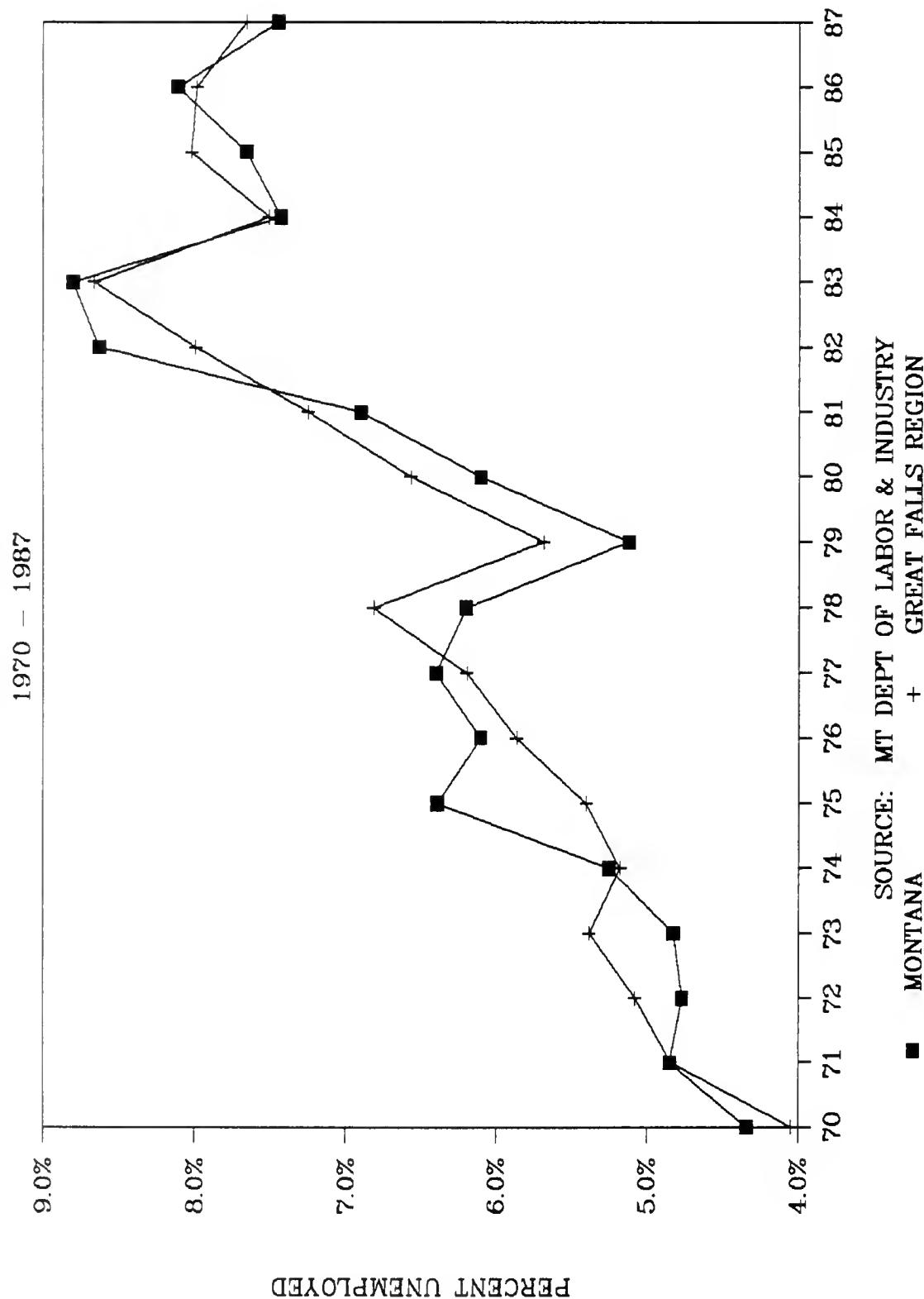
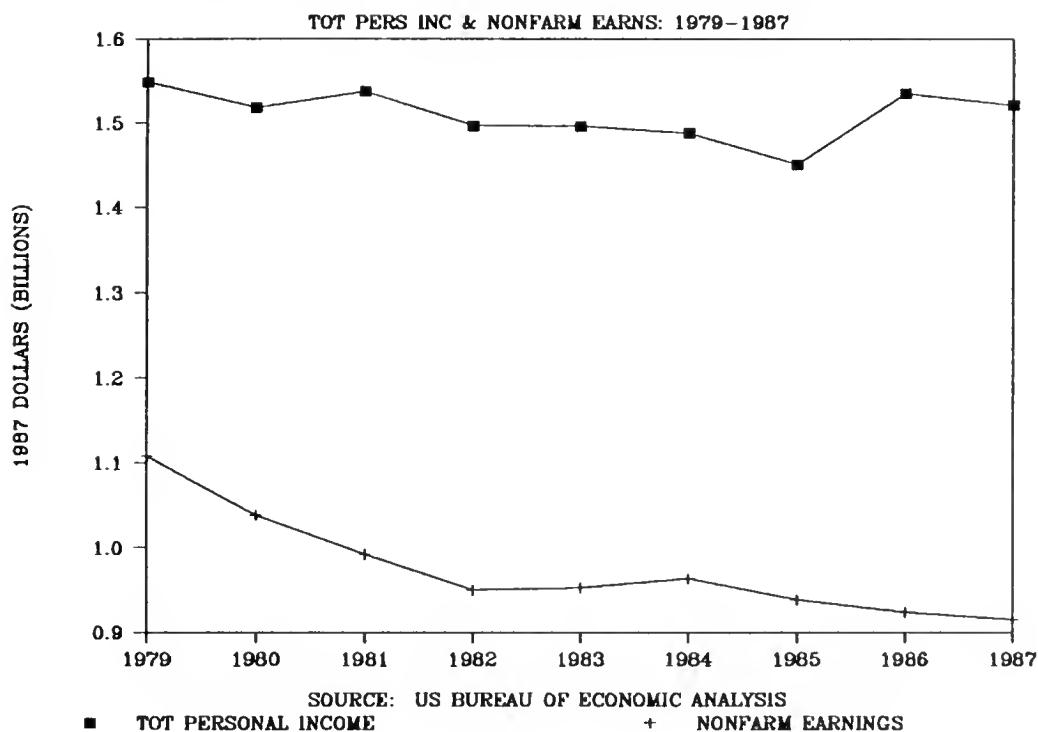
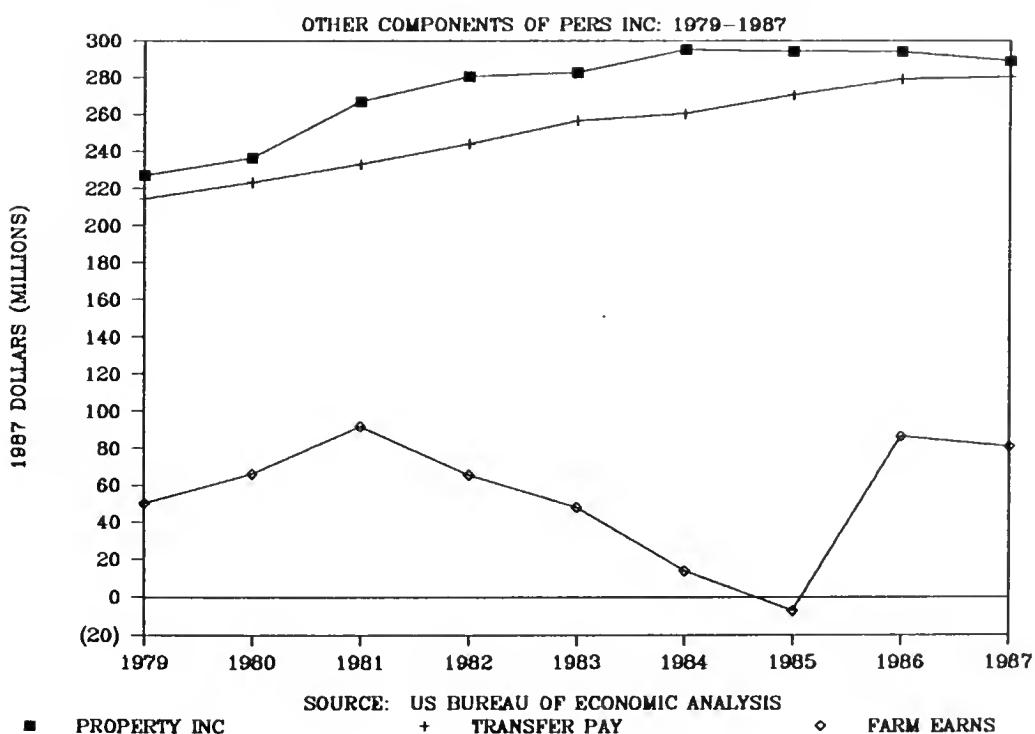


Figure 2.37

### INCOME -- GREAT FALLS REGION



### INCOME -- GREAT FALLS REGION



## The Havre Region

Located in the central portion of northern Montana, the Havre Region includes Blaine, Hill, and Liberty counties.

### Labor Force

In 1986, the Havre Region had the second smallest number of jobs in the state, about 13,000, or 3.2 percent, down from 3.9 percent in 1960. Most jobs were in Hill County, which ranked eighth in the state for total jobs (Table 2.30).

During the 1970s, both total and wage/salary jobs increased steadily (Figure 2.38). Then, beginning with the national and statewide recessions in 1980, total jobs declined gradually to the 1986 level. Between 1969 and 1986, total jobs posted a net increase of 16 percent, but during 1979-1986, they declined by 9 percent. The decline was primarily in wage/salary jobs, which fell by 16 percent, while self-employment (which accounts for about 30 percent of total jobs in the region) increased by 12 percent during the same period (Table 2.5). Between 1986 and 1987, the decline in wage/salary jobs continued (Table 2.31).

The largest industries in this region include services, retail trade, government, agriculture, and transportation/public utilities. Between 1969 and 1986, services and retail trade increased their share of wage/salary employment, while the shares of government, agriculture, and transportation/public utilities decreased. The decline in agriculture was sharpest, with its share in total jobs (including the self-employed) falling from 24 percent to 16 percent. However, since agriculture's average share of total jobs statewide in 1986 was 9 percent, it remains a very important regional industry.

Strong employment growth of the 1970s (Figure 2.38) characterized every sector in the Havre Region with the exception of agriculture, which declined throughout the state. Growth was particularly strong in railroad transportation, construction, eating/drinking places and other retail trade establishments, wholesale trade, private business and health services, and machinery manufacturing.

Similarly, the decline in total jobs between 1979 and 1986 also was felt throughout the region's industries. Declines in railroad transportation, construction, manufacturing, wholesale and most of retail trade, and services eroded much of the gain that had been made in the 1970s. Sector growth during this time period was very rare, with state government (Northern Montana College) and food stores as the only industries with significant growth in wage/salary employment.

More recently, however, several sectors in the region have begun to improve (Table 2.31). Between 1986 and 1987, wage/salary jobs in retail trade, wholesale trade, and services increased significantly. Declines in other sectors, such as heavy construction contractors and manufacturing, were large, but as a whole, the region lost fewer than 50 wage/salary jobs.

Prior to 1979, the unemployment rate was substantially less than the statewide average. Figure 2.40 shows that unemployment rates in the 1980s have been higher for the region than the 1970s. In 1987, the 7.4 percent unemployment rate of the Havre Region equaled the Montana average, which was the case since 1979. Reasons for this situation are not totally clear, but obviously are related to the overall employment decline in the region since 1979, and perhaps to a reluctance of unemployed persons to migrate out of the region.

## Population

Population of the Havre Region--the state's second smallest--totaled about 27,000 in 1987, mostly located in Hill County (Table 2.30). Since population data was first gathered for the 1920s, regional population has remained relatively steady, with an increase during the 1950s basically being offset in the 1960s (Table 2.8). Figure 2.39 illustrates these same fluctuations around the 27,000 mark since 1969, with periods of growth offsetting periods of decline.

## Income

Total regional personal income ranked 11th in 1986, consistent with the ranks of population and total jobs. In general, the components of personal income also were near this mark, with the exception of farm earnings, which ranked fourth in the state. Hill, Liberty, and Blaine counties all ranked very high in farm earnings in 1986.

Changes in total personal income between 1979 and 1987 involved two factors: steady decline of nonfarm worker earnings and volatility of farm earnings. Following the pattern of nonfarm (and total) wage/salary jobs, nonfarm worker earnings decreased steadily throughout this period (Figure 2.41). At the same time, agricultural earnings were very unsteady, peaking in 1981 before declining sharply and becoming negative by 1985, partly because of drought (Figure 2.38). Dramatic recovery in farm earnings in 1986 translated into a strong increase in total personal income. But zero growth in 1987 farm earnings caused the decline of nonfarm earnings and consequently affected total personal income. Overall, between 1979 and 1987, farm earnings increased substantially, but steady declines in nonfarm earnings in conjunction with little growth in property income and transfer payments resulted in very little growth in total personal income.

Per capita income in the Havre Region ranked ninth out of the 12 regions for the 1982-1986 period. In the county ranking, Liberty County ranked second, Blaine County ranked 53rd, and Hill County ranked 20th.

Figure 2.38

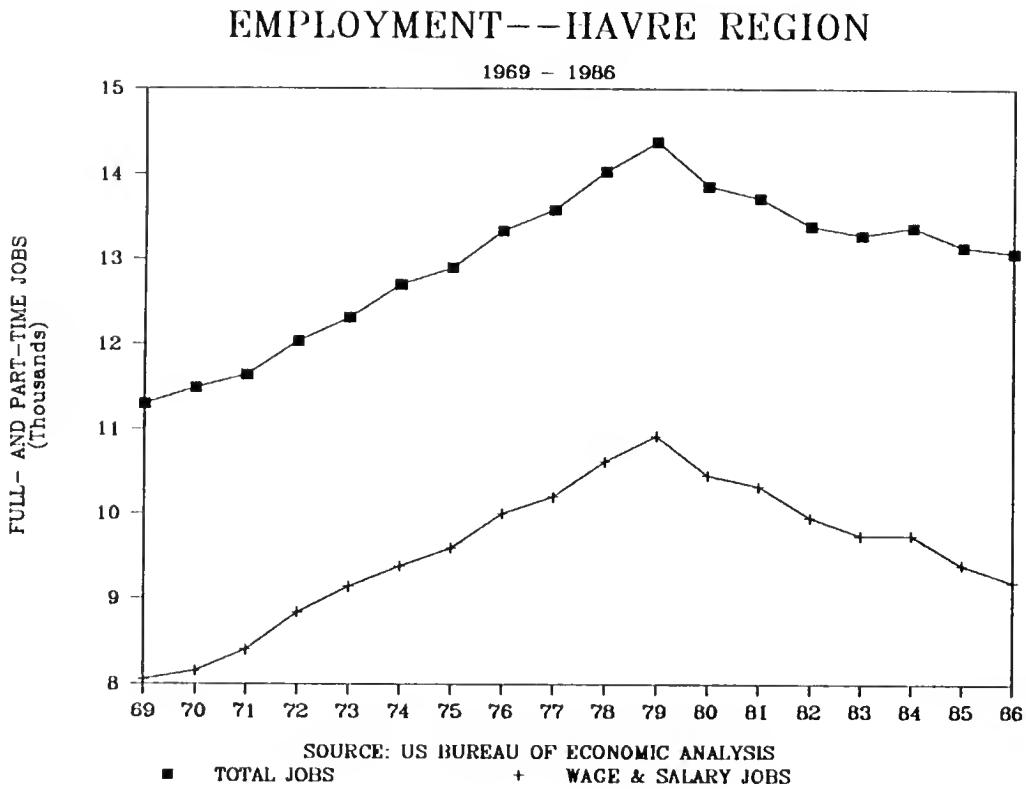


Figure 2.39

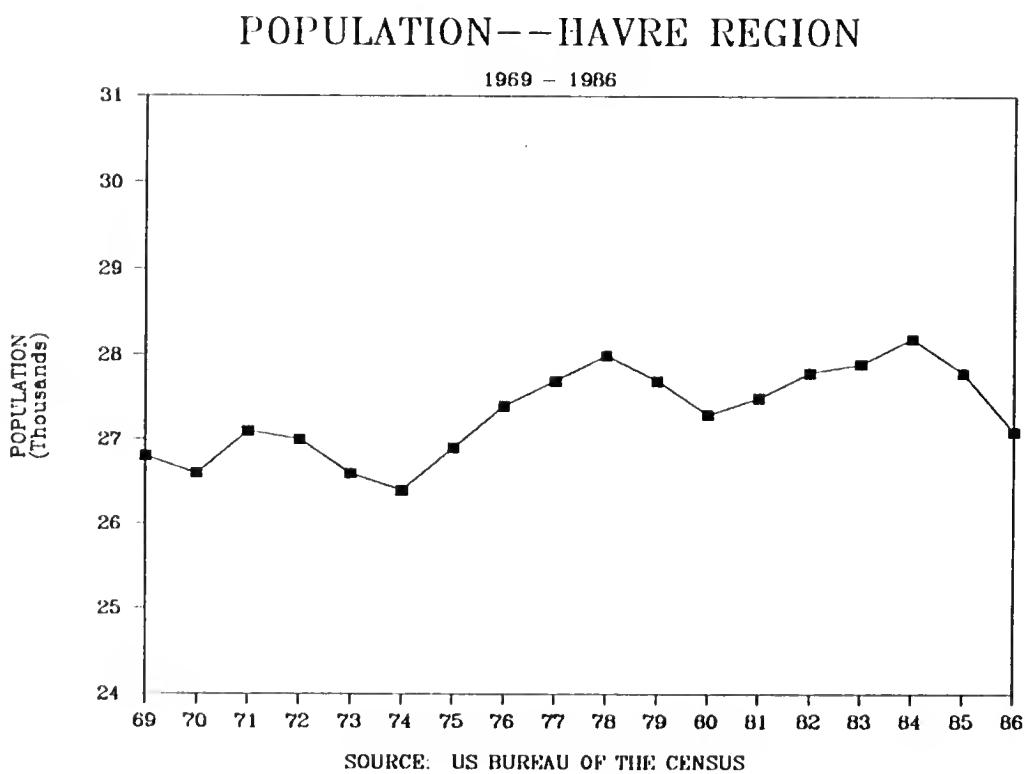


Table 2.30

|                                           | The Havre Region |         |         |         |         |         |         |         |         |         |         | Rank in State /d   |
|-------------------------------------------|------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|
|                                           | 1959             | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987 /p | (Region or County) |
| <b>Population /a</b>                      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 29,100           | 26,800  | 27,700  | 27,300  | 27,500  | 27,800  | 27,900  | 28,200  | 27,800  | 27,100  | 27,000  | 11                 |
| Blaine                                    | 8,000            | 6,900   | 7,200   | 7,000   | 6,900   | 6,900   | 6,900   | 7,100   | 7,100   | 7,000   | 6,900   | 27                 |
| Hill                                      | 18,500           | 17,500  | 18,100  | 18,000  | 18,200  | 18,500  | 18,600  | 18,500  | 18,200  | 17,800  | 17,800  | 11                 |
| Liberty                                   | 2,600            | 2,400   | 2,400   | 2,500   | 2,400   | 2,400   | 2,400   | 2,600   | 2,500   | 2,300   | 2,300   | 47                 |
| <b>Total Jobs /b</b>                      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...              | 11,302  | 14,380  | 15,858  | 13,713  | 15,389  | 13,280  | 13,372  | 13,138  | 15,074  | ...     | 11                 |
| Blaine                                    | ...              | 2,648   | 3,092   | 2,874   | 2,869   | 2,808   | 2,828   | 2,952   | 2,998   | 2,955   | ...     | 32                 |
| Hill                                      | ...              | 7,482   | 10,057  | 9,760   | 9,650   | 9,395   | 9,260   | 9,241   | 8,960   | 8,950   | ...     | 8                  |
| Liberty                                   | ...              | 1,172   | 1,231   | 1,224   | 1,208   | 1,188   | 1,192   | 1,199   | 1,180   | 1,189   | ...     | 47                 |
| <b>Wage &amp; Salary Jobs /b</b>          |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...              | 8,055   | 10,925  | 10,459  | 10,326  | 9,955   | 9,748   | 9,750   | 9,401   | 9,197   | ...     | 11                 |
| Blaine                                    | ...              | 1,687   | 2,109   | 1,921   | 1,907   | 1,859   | 1,839   | 1,921   | 1,975   | 1,886   | ...     | 29                 |
| Hill                                      | ...              | 5,786   | 8,033   | 7,738   | 7,651   | 7,357   | 7,138   | 7,069   | 6,896   | 6,584   | ...     | 8                  |
| Liberty                                   | ...              | 582     | 781     | 800     | 788     | 779     | 771     | 760     | 730     | 727     | ...     | 44                 |
| <b>Unemployment Rate /c</b>               |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | ...              | 4.2%    | 4.7%    | 6.2%    | 6.7%    | 7.8%    | 8.1%    | 7.4%    | 7.6%    | 8.3%    | 7.4%    | 7                  |
| Blaine                                    | ...              | 5.1%    | 6.9%    | 8.6%    | 8.8%    | 9.3%    | 9.6%    | 8.8%    | 8.6%    | 10.9%   | 9.3%    | 46                 |
| Hill                                      | ...              | 4.0%    | 4.2%    | 5.8%    | 6.4%    | 7.7%    | 8.1%    | 7.1%    | 7.3%    | 7.7%    | 7.0%    | 27                 |
| Liberty                                   | ...              | 5.3%    | 5.2%    | 5.1%    | 3.4%    | 4.5%    | 4.0%    | 5.2%    | 5.0%    | 4.6%    | 4.5%    | 4                  |
| <b>Total Personal Income (\$1000s) /b</b> |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 219,122          | 246,563 | 325,932 | 325,294 | 353,225 | 327,178 | 322,628 | 302,725 | 289,235 | 340,155 | 334,000 | 11                 |
| Blaine                                    | 45,817           | 49,319  | 69,279  | 65,379  | 72,151  | 64,497  | 65,253  | 62,264  | 59,615  | 72,187  | ...     | 36                 |
| Hill                                      | 144,724          | 166,907 | 228,508 | 228,958 | 242,077 | 227,675 | 222,992 | 213,102 | 202,640 | 227,524 | ...     | 9                  |
| Liberty                                   | 28,780           | 30,538  | 30,145  | 32,977  | 38,997  | 35,006  | 36,383  | 27,359  | 26,977  | 40,444  | ...     | 41                 |
| <b>Per Capita Personal Income /b</b>      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 7,550            | 9,225   | 11,787  | 11,885  | 12,815  | 11,742  | 11,564  | 10,737  | 10,395  | 12,527  | 12,400  | 9                  |
| Blaine                                    | 5,702            | 7,182   | 9,571   | 9,350   | 10,386  | 9,519   | 9,172   | 8,794   | 8,348   | 10,257  | ...     | 53                 |
| Hill                                      | 7,823            | 9,551   | 12,549  | 12,576  | 13,271  | 12,289  | 11,984  | 11,489  | 11,128  | 12,787  | ...     | 20                 |
| Liberty                                   | 11,069           | 12,717  | 12,757  | 14,099  | 16,413  | 14,483  | 14,881  | 10,662  | 10,909  | 17,410  | ...     | 2                  |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 113,767          | 135,155 | 217,333 | 204,055 | 193,859 | 185,893 | 182,314 | 183,488 | 177,876 | 174,759 | 171,000 | 11                 |
| Blaine                                    | 20,200           | 21,892  | 34,097  | 30,747  | 29,590  | 28,498  | 29,558  | 30,647  | 31,670  | 30,247  | ...     | 32                 |
| Hill                                      | 85,881           | 104,542 | 170,917 | 161,442 | 152,779 | 146,168 | 141,629 | 141,486 | 134,925 | 133,447 | ...     | 8                  |
| Liberty                                   | 7,666            | 8,721   | 12,518  | 11,866  | 11,490  | 11,227  | 11,127  | 11,355  | 11,082  | 11,064  | ...     | 45                 |
| <b>Farm Earnings (\$1000s) /b</b>         |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 64,981           | 56,684  | 17,297  | 23,596  | 51,595  | 26,415  | 23,800  | (608)   | (8,573) | 44,182  | 44,000  | 4                  |
| Blaine                                    | 15,184           | 12,693  | 8,189   | 6,189   | 12,846  | 4,378   | 1,912   | (1,209) | (4,523) | 9,107   | ...     | 19                 |
| Hill                                      | 33,382           | 27,100  | 3,875   | 9,469   | 25,307  | 12,732  | 11,154  | (700)   | (5,054) | 20,423  | ...     | 3                  |
| Liberty                                   | 16,416           | 14,891  | 5,232   | 7,959   | 15,445  | 9,305   | 10,753  | 1,301   | 1,004   | 14,652  | ...     | 7                  |
| <b>Property Income (\$1000s) /b</b>       |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 29,472           | 38,441  | 58,635  | 61,783  | 70,297  | 72,975  | 72,116  | 75,257  | 74,647  | 73,802  | 72,000  | 12                 |
| Blaine                                    | 5,487            | 7,761   | 15,577  | 15,952  | 15,284  | 16,382  | 16,277  | 16,554  | 16,302  | 16,246  | ...     | 52                 |
| Hill                                      | 19,769           | 25,450  | 36,992  | 59,194  | 45,280  | 46,764  | 46,319  | 49,193  | 48,361  | 47,865  | ...     | 10                 |
| Liberty                                   | 4,236            | 5,243   | 8,064   | 8,657   | 9,735   | 9,849   | 9,520   | 9,510   | 9,984   | 9,913   | ...     | 40                 |
| <b>Transfer Payments (\$1000s) /b</b>     |                  |         |         |         |         |         |         |         |         |         |         |                    |
| Region                                    | 15,590           | 25,780  | 46,897  | 49,100  | 50,772  | 55,090  | 57,016  | 57,482  | 58,826  | 61,008  | 61,000  | 11                 |
| Blaine                                    | 5,194            | 7,686   | 12,806  | 13,411  | 13,544  | 14,279  | 14,509  | 15,211  | 15,742  | 16,285  | ...     | 28                 |
| Hill                                      | 9,364            | 16,404  | 30,477  | 52,011  | 53,598  | 56,641  | 57,921  | 57,611  | 58,480  | 59,973  | ...     | 10                 |
| Liberty                                   | 1,032            | 1,690   | 3,614   | 3,677   | 3,630   | 4,169   | 4,586   | 4,660   | 4,604   | 4,750   | ...     | 47                 |

/a U.S. Bureau of the Census /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.31

WAGE &amp; SALARY EMPLOYMENT IN THE HAYRE REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 6,945   | 6,897   | (48)   | -0.7%             |
| Total Private                                       |               | 4,785   | 4,749   | (36)   | -0.8%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 120     | 113     | (7)    | -5.8%             |
| Agricultural Production--Crops ***                  | 01            | 45      | 41      | (4)    | -8.9%             |
| Agricultural Production--Livestock ***              | 02            | 24      | 19      | (5)    | -20.8%            |
| Agricultural Services                               | 07            | 49      | 51      | 2      | 4.1%              |
| Forestry                                            | 08            |         |         |        |                   |
| Fishing, Hunting, and Trapping                      | 09            |         |         |        |                   |
| Mining                                              |               |         |         |        |                   |
| Metal Mining                                        | 10            | E 59    | E 42    | E (17) | E -28.8%          |
| Coal Mining                                         | 12            |         |         |        |                   |
| Oil and Gas Extraction                              | 13            | 59      | 42      | (17)   | -28.8%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | "0"     | "0"     | "0"    | "0"               |
| Construction                                        |               |         |         |        |                   |
| General Building Contractors                        | 15            | 293     | 203     | (90)   | -30.7%            |
| Heavy Construction Contractors                      | 16            | 153     | 61      | (92)   | -60.1%            |
| Special Trade Contractors                           | 17            | 95      | 95      | 0      | 0.0%              |
| Manufacturing                                       |               |         |         |        |                   |
| Food and Kindred Products                           | 20            | 201     | 159     | (42)   | -20.9%            |
| Textile Mill Products                               | 22            | "0"     | 55      | "0"    | "0"               |
| Apparel and Other Textile Products                  | 23            |         |         |        |                   |
| Lumber and Wood Products                            | 24            |         |         |        |                   |
| Furniture and Fixtures                              | 25            |         |         |        |                   |
| Paper and Allied Products                           | 26            |         |         |        |                   |
| Printing and Publishing                             | 27            | 48      | 45      | (3)    | -6.3%             |
| Chemicals and Allied Products                       | 28            | 19      | 19      | 0      | 0.0%              |
| Petroleum Refining and Related Industries           | 29            |         |         |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            |         |         |        |                   |
| Leather and Leather Products                        | 31            |         |         |        |                   |
| Stone, Clay, Glass, and Concrete Products           | 32            | 38      | 28      | (10)   | -26.3%            |
| Primary Metals Processing                           | 33            |         |         |        |                   |
| Fabricated Metal Products                           | 34            |         |         |        |                   |
| Machinery, Except Electrical                        | 35            | "0"     | "0"     | "0"    | "0"               |
| Electrical and Electronic Equipment                 | 36            |         |         |        |                   |
| Transportation Equipment                            | 37            |         |         |        |                   |
| Instruments and Related Products                    | 38            | "0"     | "0"     | "0"    | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | "0"     | "0"     | "0"    | "0"               |
| Transportation and Public Utilities                 |               |         |         |        |                   |
| Local and Interurban Passenger Transit              | 41            | 283     | "0"     | "0"    | "0"               |
| Trucking and Warehousing                            | 42            | 11      | 7       | (4)    | -36.4%            |
| Water Transportation                                | 44            |         |         |        |                   |
| Transportation by Air                               | 45            |         |         |        |                   |
| Pipelines, Except Natural Gas                       | 46            | "0"     | 8       | "0"    | "0"               |
| Transportation Services                             | 47            | "0"     | "0"     | "0"    | "0"               |
| Communications                                      | 48            | 50      | 48      | (2)    | -4.0%             |
| Electric, Gas, and Sanitary Services                | 49            | 146     | 143     | (3)    | -2.1%             |
| Wholesale Trade                                     |               |         |         |        |                   |
| Durable Goods                                       | 50            | 266     | 309     | 43     | 16.2%             |
| Non-durable Goods                                   | 51            | 133     | 180     | 47     | 35.3%             |
| Retail Trade                                        |               |         |         |        |                   |
| Building Materials and Hardware                     | 52            | 1,482   | 1,541   | 59     | 4.0%              |
| General Merchandise Stores                          | 53            | 66      | 64      | (2)    | -3.0%             |
| Food Stores                                         | 54            | 145     | 171     | 26     | 17.9%             |
| Automotive Dealers and Service Stations             | 55            | 291     | 292     | 1      | 0.3%              |
| Apparel and Accessory Stores                        | 56            | 187     | 189     | 2      | 1.1%              |
| Furniture and Home Furnishings Stores               | 57            | 78      | 86      | 8      | 10.3%             |
| Eating and Drinking Places                          | 58            | 36      | 33      | (3)    | -8.3%             |
| Miscellaneous Retail                                | 59            | 551     | 578     | 27     | 4.9%              |
|                                                     | 60            | 121     | 118     | (3)    | -2.5%             |
| Finance, Insurance, and Real Estate                 |               |         |         |        |                   |
| Banking                                             | 60            | 296     | "0"     | "0"    | "0"               |
| Credit Agencies other than Banks                    | 61            | 126     | 119     | (7)    | -5.6%             |
| Security, Commodity Brokers, and Services           | 62            | 48      | 49      | 1      | 2.1%              |
| Insurance Carriers                                  | 63            | "0"     | 7       | "0"    | "0"               |
| Insurance Agents, Brokers, and Services             | 64            | "0"     | "0"     | "0"    | "0"               |
| Real Estate                                         | 65            | 42      | 40      | (2)    | -4.8%             |
| Combined Real Estate, Insurance, Etc.               | 66            | 66      | 64      | (2)    | -3.0%             |
| Holding and Other Investment Offices                | 67            |         |         |        |                   |
| Services                                            |               | E 1,751 | E 1,787 | E 36   | E 2.1%            |
| Hotels and Other Lodging Places                     | 70            | 126     | 121     | (5)    | -4.0%             |
| Personal Services                                   | 72            | 80      | 86      | 6      | 7.5%              |
| Business Services                                   | 73            | 84      | 106     | 22     | 26.2%             |
| Auto Repair, Services, and Garages                  | 75            | 49      | 52      | 3      | 6.1%              |
| Miscellaneous Repair Services                       | 76            | 28      | 24      | (4)    | -14.3%            |
| Motion Pictures                                     | 78            | 27      | 29      | 2      | 7.4%              |
| Amusement and Recreation Services                   | 79            | 43      | 39      | (4)    | -9.3%             |
| Private Health Services                             | 80            | 623     | 637     | 14     | 2.2%              |
| Legal Services                                      | 81            | 61      | 61      | 0      | 0.0%              |
| Private Educational Services                        | 82            | 96      | 108     | 12     | 12.5%             |
| Private Social Services                             | 83            | 210     | 227     | 17     | 8.1%              |
| Museums, Art Galleries, Etc.                        | 84            | "0"     | "0"     | "0"    | "0"               |
| Membership Organizations Including Tribal Gov't     | 86            | 245     | 221     | (24)   | -9.8%             |
| Private Households                                  | 88            | 13      | 13      | 0      | 0.0%              |
| Engineering, Accounting, and Other Services         | 89            | 66      | 63      | (3)    | -4.5%             |
| Non-Classifiable                                    | 99            | 2       |         | (2)    | -100.0%           |
| Government                                          |               | 2,158   | 2,146   | (12)   | -0.6%             |
| State                                               |               | 405     | 382     | (23)   | -5.7%             |
| Local                                               |               | 1,389   | 1,377   | (12)   | -0.9%             |
| Federal                                             |               | 361     | 384     | 23     | 6.4%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.40

## UNEMPLOYMENT RATE--HAVRE REGION

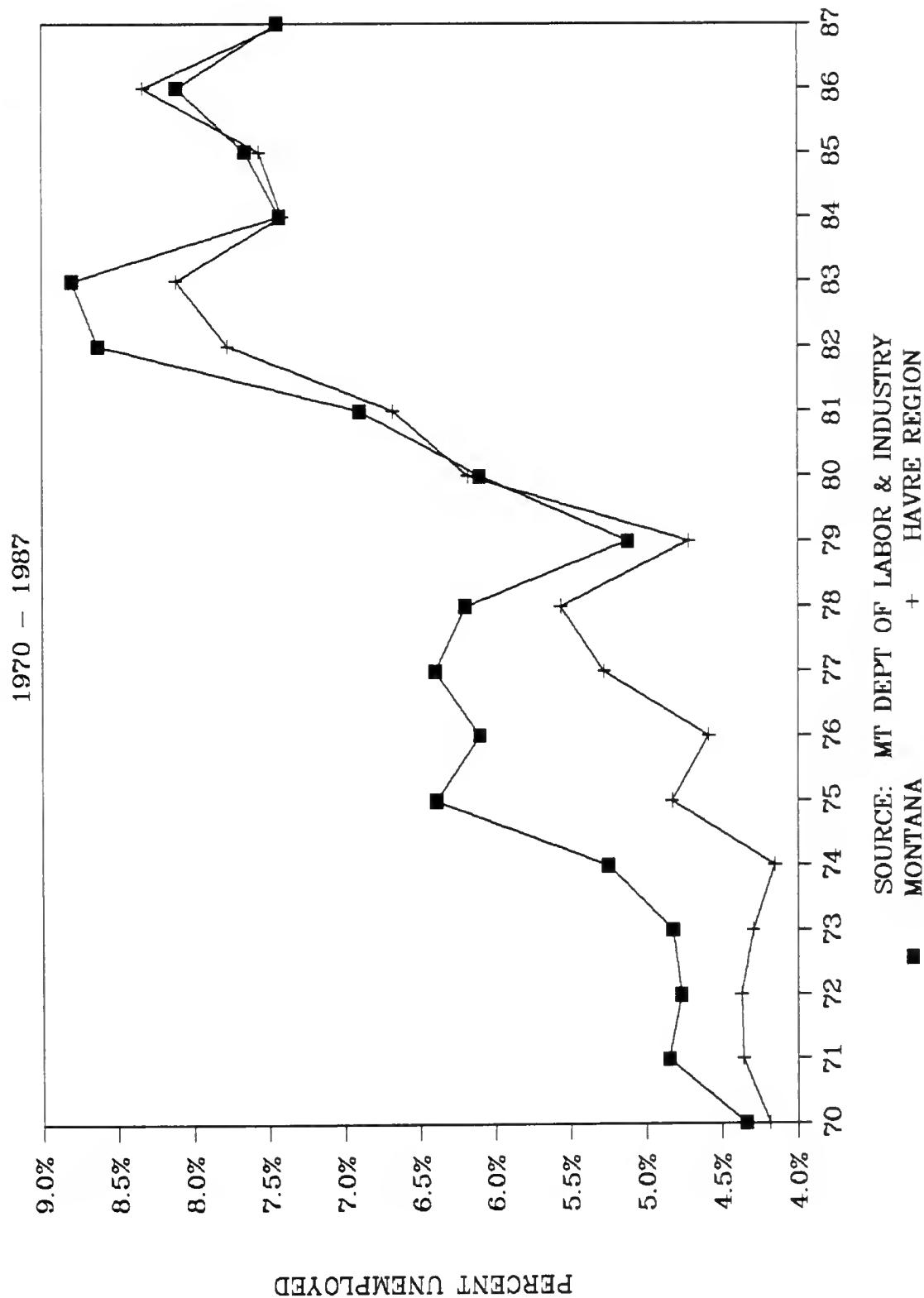
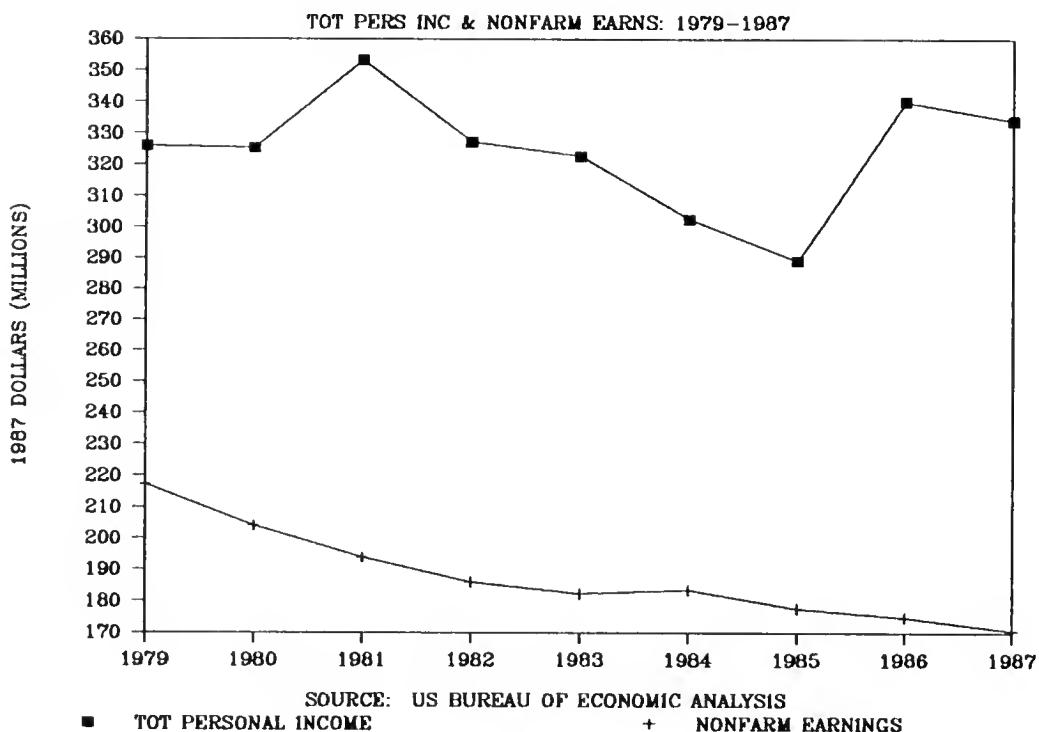
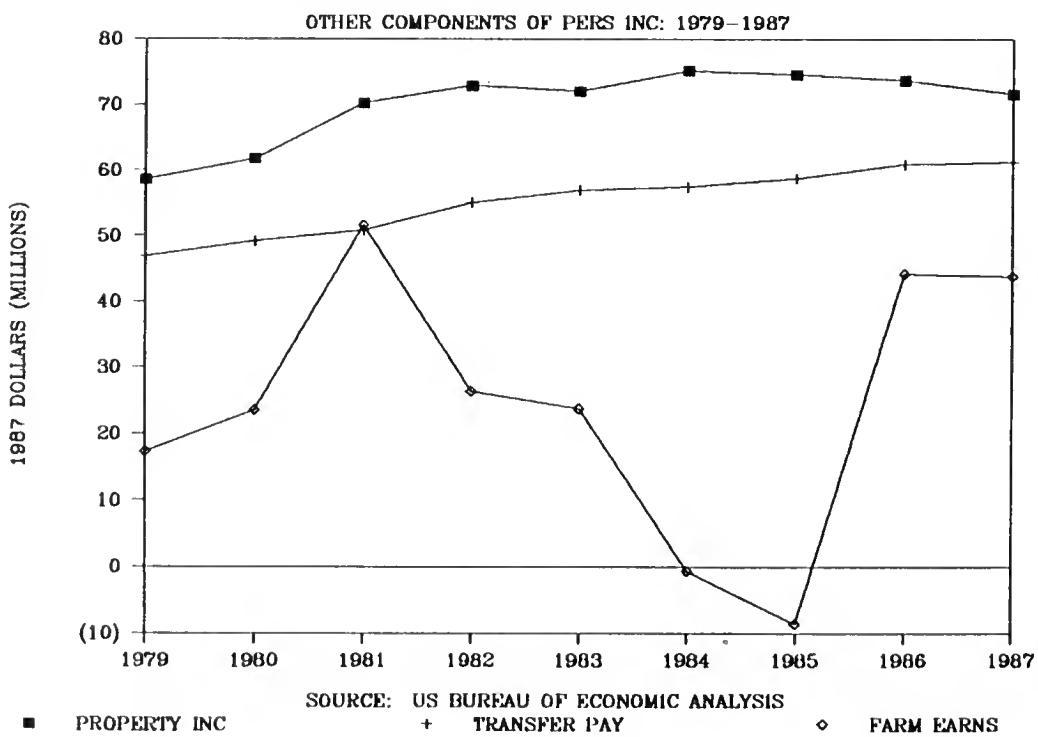


Figure 2.41

## INCOME -- HAVRE REGION



## INCOME -- HAVRE REGION



## The Helena Region

The Helena Region of west central Montana includes Broadwater, Jefferson, and Lewis and Clark counties.

### Labor Force

In 1986, the Helena Region ranked sixth in the state with more than 33,000 total jobs. A rank of fifth for wage/salary jobs (Table 2.32) reflects a concentration of government jobs and fewer agricultural jobs in Lewis and Clark County. The region's share of total jobs (including self-employed) increased significantly from 6.7 percent in 1969 to 8.1 percent by 1986.

Job growth between 1969 and 1986 was exceptionally strong in the region, with total jobs increasing by 71 percent, an increase second only to that of the Bozeman Region. Steady growth in the early 1970s was eclipsed by strong growth at the end of the decade. Growth slowed in the early 1980s, however, as the state and the nation experienced a recession. The region's only year of job decline occurred in 1982. Steady growth returned in 1983, and continued through 1987 (Figure 2.44 and Table 2.32).

The widening gap between wage/salary jobs and total jobs shown in Figure 2.42 reflects the outstanding growth of self-employment in the Helena Region, particularly in recent years. Between 1979 and 1986, wage/salary jobs grew by 6 percent, the second highest percentage growth in the state. The self-employed increase during this same period was 55 percent, the largest increase in the state. As a result, total jobs between 1979 and 1986 grew by 15 percent (Table 2.5). The share of the region's jobs held by the self-employed also increased dramatically. In 1969, self-employment accounted for only 14 percent of total jobs in the region. By 1986, however, this figure had grown to 23 percent, but it was still below the Montana average of 26 percent because of the small agricultural sector in the region.

The majority of jobs in the Helena Region were concentrated in three sectors: government, services, and retail trade. Transportation/public utilities, manufacturing, agriculture, construction, wholesale trade, and mining all held a smaller share of jobs regionally than the statewide average, and each of these sectors (except mining) declined as a percentage of wage/salary jobs between 1969 and 1986. The shares of services and retail trade increased markedly, following a statewide trend. Government remained an important employer in the region because of the location of the state capital and the federal offices in Helena, but government jobs decreased as a share of total jobs from 32 percent in 1969 to 26 percent in 1986. This share, however, was still significantly greater than the 1986 Montana average of 18 percent.

Between 1969 and 1979, nearly every sector of the Helena Region enjoyed strong growth in wage/salary jobs. Even agricultural jobs (including the self-employed) increased. The only declining sector was mining, with a small loss occurring in the metal mining industry. Strongest job growth during this period was in state/local government, eating/drinking places, communications, lumber/wood products, hotels/motels, and banking/other credit services.

The period of 1979-1986 was one of slower growth in the region. Several factors were responsible for this slowdown. A decline in the communications industry after 1981, primarily because of Mountain Bell reorganization, meant the loss of about 500 jobs, which offset the growth that occurred during the 1970s. Smaller declines also took place in lumber/wood products, hotels/motels, finance/insurance/real estate, and construction (primarily in special trade contractors). Growth in other sectors, however, more than offset these declines. State/local government, eating/drinking places, private business/health/social services, food stores, and metal mining all posted significant increases in wage/salary jobs between 1979-1986.

Table 2.33 shows changes in wage/salary employment between 1986 and 1987. Relatively large declines in communications, manufacturing (including wood products), and heavy construction contractors occurred. But strong gains in private health services, metal mining, eating/drinking places, and private business services more than offset these declines, with wage/salary jobs growing by 2.6 percent or nearly 600 jobs.

A favorable unemployment rate in Lewis and Clark County, coupled with the exceptionally low rate in Jefferson County, placed the Helena Region at the top of the state in 1987 with its relatively low unemployment rate of 6.3 percent. Figure 2.44 illustrates the region's above-average performance between 1970 and 1987, as well as the tendency for the regional unemployment rate and the statewide average to move in tandem.

### Population

In 1987, the population of nearly 59,000 for the Helena Region ranked seventh in the state, somewhat lower than the sixth place rank of total jobs and the fifth place performance of wage/salary jobs. Lewis and Clark County accounted for over 75 percent of the total population and ranked sixth out of the 56 counties.

Historically, population growth in the Helena Region has been strong, with the exception of the 1910-1930 period. Growth continued in recent years (Figure 2.43), with population increasing by 45 percent between 1969 and 1987, thus producing the greatest change in the state, and outdistancing the Montana average of 17 percent.

### Income

Total personal income ranked sixth in the Helena Region in 1986, which is consistent with the total jobs figure. Nonfarm worker earnings ranked slightly higher at fifth, reflecting a similar rank for wage/salary jobs, while farm earnings for this region ranked last in the state. By far the largest part of the non-agricultural income components were associated with Lewis and Clark County, although farm earnings were shared much more evenly (Table 2.32).

Steady, moderate growth of total personal income for this region results from contributions from each component during different years (Figure 2.45).

Between 1979 and 1982, when both nonfarm earnings and farm earnings declined, total personal income grew because of solid growth in property income and transfer payments. Between 1982 and 1985, farm earnings were very low and not growing, property income stagnated, but transfer payments grew. Solid growth in nonfarm earnings through 1985, however, translated into growth in total personal income. In 1986, nonfarm earnings declined some, but agricultural recovery produced growth in both farm earnings and total personal income. In 1987, when farm earnings remained unchanged over the previous year, nonfarm earnings contributed to the growth of total income. As a result of all components' contributions, total personal income grew by 9 percent between 1979 and 1986, the third highest growth in the state, while statewide income grew by only 3 percent (Table 2.10).

The Helena Region ranked second in the state in per capita income for the 1982-1986 period, slightly behind the Billings Region. Lewis and Clark County ranked third among Montana's counties, Jefferson County ranked ninth, and Broadwater County, hampered by several years of very low farm earnings, ranked 51st. Only Broadwater County remained consistently below Montana's per capita income between 1979 and 1986 (Table 2.32). Throughout this period, per capita income for the region hovered slightly above \$13,000.

Figure 2.42

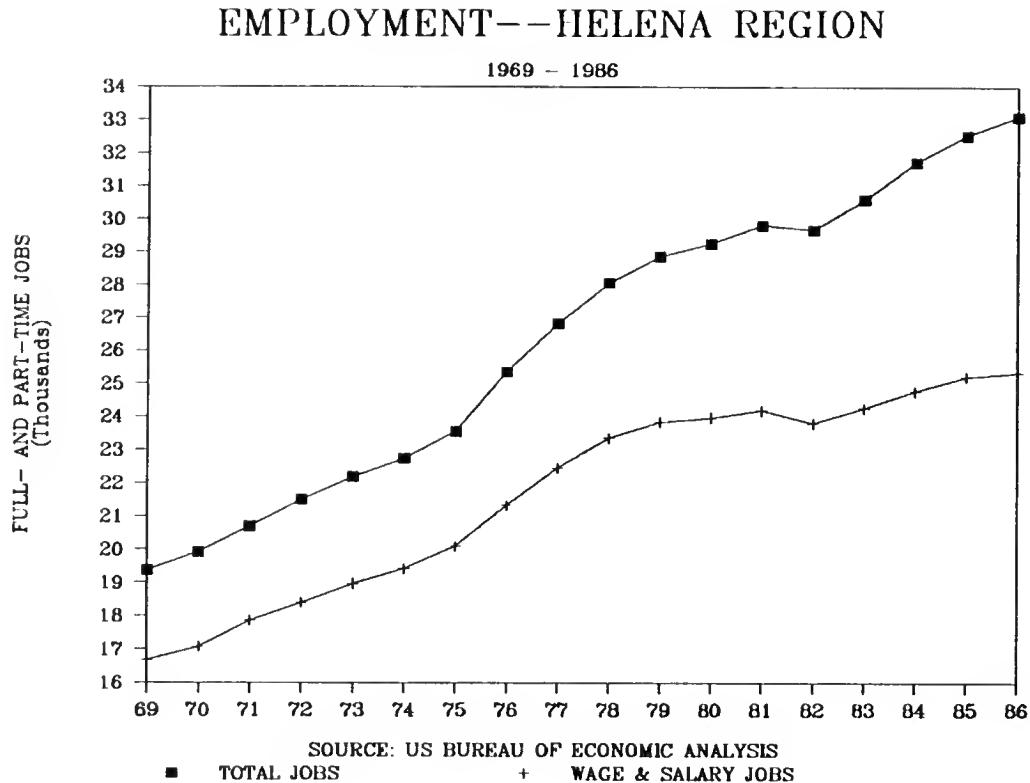


Figure 2.43

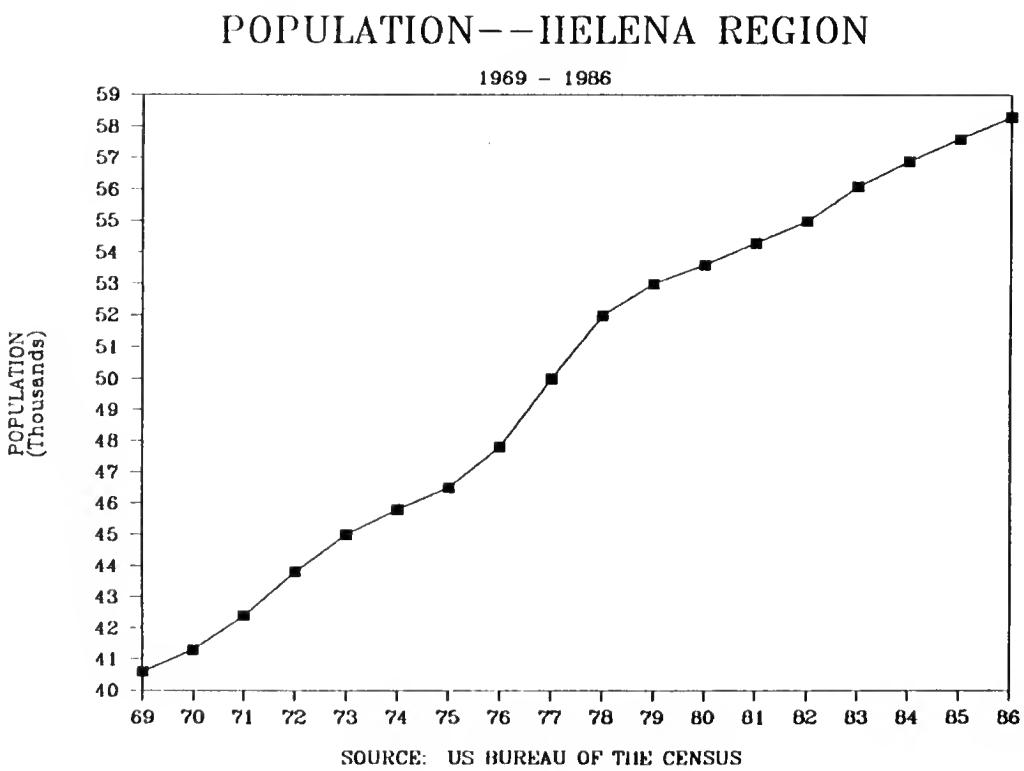


Table 2.32

|                                           | The Helena Region |         |         |         |         |         |         |         |         |         |         | Rank in State /d<br>(Region or County) |
|-------------------------------------------|-------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------------------------------------|
|                                           | 1959              | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987 /p |                                        |
| <b>Population /a</b>                      |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 34,900            | 40,600  | 53,000  | 53,600  | 34,300  | 55,000  | 56,100  | 56,900  | 57,600  | 58,300  | 58,800  | 7                                      |
| Broadwater                                | 2,800             | 2,600   | 3,300   | 3,300   | 3,200   | 3,300   | 3,400   | 3,400   | 3,500   | 3,600   | 3,700   | 40                                     |
| Jefferson                                 | 4,300             | 5,200   | 7,200   | 7,100   | 7,200   | 7,300   | 7,700   | 8,000   | 8,000   | 8,100   | 8,300   | 26                                     |
| Lewis & Clark                             | 27,800            | 32,800  | 42,500  | 43,200  | 43,900  | 44,400  | 45,000  | 45,500  | 46,100  | 46,600  | 46,800  | 6                                      |
| <b>Total Jobs /b</b>                      |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | ...               | 19,380  | 28,863  | 29,248  | 29,815  | 29,670  | 30,602  | 31,723  | 32,530  | 33,099  | ...     | 6                                      |
| Broadwater                                | ...               | 1,038   | 1,646   | 1,461   | 1,474   | 1,454   | 1,521   | 1,591   | 1,584   | 1,546   | ...     | 40                                     |
| Jefferson                                 | ...               | 1,852   | 2,145   | 2,237   | 2,356   | 2,605   | 2,800   | 2,919   | 5,009   | 5,041   | ...     | 29                                     |
| Lewis & Clark                             | ...               | 16,490  | 25,072  | 25,550  | 25,985  | 25,611  | 26,281  | 27,213  | 27,937  | 28,512  | ...     | 4                                      |
| <b>Wage &amp; Salary Jobs /b</b>          |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | ...               | 16,677  | 23,842  | 23,959  | 24,187  | 23,795  | 24,248  | 24,762  | 25,189  | 25,324  | ...     | 5                                      |
| Broadwater                                | ...               | 647     | 1,135   | 962     | 961     | 924     | 959     | 996     | 972     | 911     | ...     | 40                                     |
| Jefferson                                 | ...               | 1,443   | 1,405   | 1,446   | 1,482   | 1,679   | 1,791   | 1,851   | 1,899   | 1,881   | ...     | 30                                     |
| Lewis & Clark                             | ...               | 14,587  | 21,302  | 21,551  | 21,744  | 21,192  | 21,498  | 21,915  | 22,318  | 22,532  | ...     | 4                                      |
| <b>Unemployment Rate /c</b>               |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | ...               | 3.5%    | 4.9%    | 5.2%    | 6.0%    | 7.6%    | 7.8%    | 6.5%    | 6.7%    | 6.8%    | 6.3%    | 1                                      |
| Broadwater                                | ...               | 2.9%    | 3.9%    | 7.1%    | 7.1%    | 9.9%    | 9.7%    | 7.9%    | 8.6%    | 11.9%   | 9.6%    | 47                                     |
| Jefferson                                 | ...               | 4.4%    | 7.4%    | 6.5%    | 7.5%    | 10.4%   | 11.2%   | 8.1%    | 8.0%    | 6.0%    | 4.7%    | 8                                      |
| Lewis & Clark                             | ...               | 3.4%    | 4.8%    | 5.0%    | 5.8%    | 7.2%    | 7.2%    | 6.5%    | 6.7%    | 6.7%    | 6.5%    | 21                                     |
| <b>Total Personal Income (\$1000s) /b</b> |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 285,242           | 418,515 | 706,262 | 709,296 | 716,726 | 722,491 | 732,126 | 743,740 | 760,712 | 769,973 | 785,000 | 6                                      |
| Broadwater                                | 17,459            | 19,650  | 37,477  | 34,287  | 32,601  | 30,794  | 32,263  | 32,043  | 31,243  | 38,299  | ...     | 42                                     |
| Jefferson                                 | 25,913            | 40,059  | 85,922  | 87,202  | 88,412  | 90,016  | 95,059  | 98,166  | 100,640 | 105,368 | ...     | 23                                     |
| Lewis & Clark                             | 241,871           | 358,806 | 582,862 | 587,827 | 595,713 | 601,681 | 604,804 | 613,551 | 628,828 | 626,307 | ...     | 5                                      |
| <b>Per Capita Personal Income /b</b>      |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 8,173             | 10,329  | 13,324  | 13,243  | 13,191  | 13,136  | 13,059  | 13,084  | 13,207  | 13,223  | 13,400  | 2                                      |
| Broadwater                                | 6,235             | 7,700   | 11,458  | 10,531  | 10,200  | 9,332   | 9,487   | 9,372   | 8,889   | 10,728  | ...     | 51                                     |
| Jefferson                                 | 6,026             | 7,768   | 11,872  | 12,327  | 12,217  | 12,349  | 12,339  | 12,326  | 12,545  | 13,033  | ...     | 9                                      |
| Lewis & Clark                             | 8,700             | 10,936  | 13,715  | 13,598  | 13,569  | 13,548  | 13,453  | 13,495  | 13,651  | 13,648  | ...     | 3                                      |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 206,102           | 315,672 | 517,132 | 510,689 | 508,387 | 508,241 | 519,826 | 527,995 | 543,181 | 532,604 | 548,000 | 5                                      |
| Broadwater                                | 7,129             | 9,231   | 21,073  | 16,480  | 15,305  | 14,584  | 15,708  | 15,634  | 15,150  | 14,732  | ...     | 40                                     |
| Jefferson                                 | 15,054            | 24,384  | 27,630  | 27,370  | 27,416  | 35,556  | 36,317  | 39,899  | 42,225  | 41,000  | ...     | 26                                     |
| Lewis & Clark                             | 183,919           | 282,058 | 468,429 | 466,838 | 465,666 | 458,101 | 467,801 | 472,462 | 485,825 | 476,872 | ...     | 4                                      |
| <b>Farm Earnings (\$1000s) /b</b>         |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 18,602            | 17,797  | 13,180  | 13,544  | 7,637   | 2,643   | 2,967   | 2,955   | 786     | 11,992  | 11,000  | 12                                     |
| Broadwater                                | 6,589             | 4,273   | 3,266   | 3,726   | 1,897   | 0       | 859     | 91      | (1,820) | 5,401   | ...     | 33                                     |
| Jefferson                                 | 3,123             | 2,813   | 4,624   | 3,938   | 2,571   | 517     | 273     | 476     | 50      | 2,537   | ...     | 51                                     |
| Lewis & Clark                             | 8,890             | 10,711  | 5,290   | 5,880   | 3,369   | 2,126   | 1,836   | 2,388   | 2,556   | 4,053   | ...     | 42                                     |
| <b>Property Income (\$1000s) /b</b>       |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 42,343            | 54,326  | 96,913  | 100,443 | 113,766 | 122,787 | 118,396 | 124,280 | 124,900 | 125,259 | 125,000 | 7                                      |
| Broadwater                                | 2,305             | 3,596   | 7,457   | 7,474   | 8,124   | 8,406   | 7,988   | 8,201   | 9,085   | 9,052   | ...     | 44                                     |
| Jefferson                                 | 2,704             | 3,865   | 11,051  | 11,212  | 12,395  | 13,122  | 14,315  | 16,141  | 16,776  | 16,807  | ...     | 31                                     |
| Lewis & Clark                             | 37,334            | 47,066  | 78,404  | 81,758  | 93,249  | 101,260 | 96,092  | 99,938  | 99,039  | 99,399  | ...     | 8                                      |
| <b>Transfer Payments (\$1000s) /b</b>     |                   |         |         |         |         |         |         |         |         |         |         |                                        |
| Region                                    | 24,596            | 46,413  | 100,571 | 106,707 | 113,003 | 119,740 | 124,257 | 126,052 | 133,266 | 138,024 | 139,000 | 6                                      |
| Broadwater                                | 1,543             | 2,527   | 4,728   | 5,293   | 6,076   | 6,673   | 6,734   | 6,969   | 7,604   | 7,977   | ...     | 39                                     |
| Jefferson                                 | 2,864             | 5,412   | 11,903  | 12,661  | 13,865  | 14,681  | 14,958  | 15,450  | 15,817  | 16,394  | ...     | 27                                     |
| Lewis & Clark                             | 20,189            | 38,473  | 83,940  | 88,753  | 93,062  | 98,387  | 102,566 | 103,633 | 109,846 | 113,653 | ...     | 5                                      |

/a U.S. Bureau of the Census /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.33

WAGE &amp; SALARY EMPLOYMENT IN THE HELENA REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 22,803  | 23,394  | 591    | 2.6%              |
| Total Private                                       |               | 14,541  | 15,108  | 567    | 3.9%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 211         | E 227   | E 16    | E 7.6% |                   |
| Agricultural Production--Crops ***                  | 01            | 66      | 78      | 12     | 18.2%             |
| Agricultural Production--Livestock ***              | 02            | 95      | 98      | 3      | 3.2%              |
| Agricultural Services                               | 07            | 50      | 51      | 1      | 2.0%              |
| Forestry                                            | 08            | "0"     | "0"     | "0"    | "0"               |
| Fishing, Hunting, and Trapping                      | 09            |         |         |        |                   |
| Mining                                              |               | 333     | "0"     | "0"    | "0"               |
| Metal Mining                                        | 10            | 307     | 444     | 137    | 44.6%             |
| Coal Mining                                         | 12            |         |         |        |                   |
| Oil and Gas Extraction                              | 13            | 1       | "0"     | "0"    | "0"               |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 24      | 27      | 3      | 12.5%             |
| Construction                                        |               | 636     | 525     | (111)  | -17.5%            |
| General Building Contractors                        | 15            | 231     | 196     | (35)   | -15.2%            |
| Heavy Construction Contractors                      | 16            | 175     | 80      | (95)   | -54.3%            |
| Special Trade Contractors                           | 17            | 226     | 248     | 22     | 9.7%              |
| Manufacturing                                       |               | 1,187   | 1,074   | (113)  | -9.5%             |
| Food and Kindred Products                           | 20            | 136     | 132     | (4)    | -2.9%             |
| Textile Mill Products                               | 22            |         |         |        |                   |
| Apparel and Other Textile Products                  | 23            | "0"     | "0"     | "0"    | "0"               |
| Lumber and Wood Products                            | 24            | 237     | 186     | (51)   | -21.5%            |
| Furniture and Fixtures                              | 25            |         |         |        |                   |
| Paper and Allied Products                           | 26            |         |         |        |                   |
| Printing and Publishing                             | 27            | 180     | 178     | (2)    | -1.1%             |
| Chemicals and Allied Products                       | 28            | 135     | 121     | (14)   | -10.4%            |
| Petroleum Refining and Related Industries           | 29            |         |         |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            | "0"     | "0"     | "0"    | "0"               |
| Leather and Leather Products                        | 31            |         |         |        |                   |
| Stone, Clay, Glass, and Concrete Products           | 32            | 131     | 116     | (15)   | +11.5%            |
| Primary Metals Processing                           | 33            | "0"     | "0"     | "0"    | "0"               |
| Fabricated Metal Products                           | 34            | 14      | 5       | (9)    | -64.3%            |
| Machinery, Except Electrical                        | 35            | "0"     | "0"     | "0"    | "0"               |
| Electrical and Electronic Equipment                 | 36            | "0"     | "0"     | "0"    | "0"               |
| Transportation Equipment                            | 37            | "0"     | "0"     | "0"    | "0"               |
| Instruments and Related Products                    | 38            |         |         |        |                   |
| Miscellaneous Manufacturing Industries              | 39            | 9       | 13      | 4      | 44.4%             |
| Transportation and Public Utilities                 |               | 1,356   | 1,189   | (167)  | -12.3%            |
| Local and Interurban Passenger Transit              | 41            | 76      | 65      | (11)   | -14.5%            |
| Trucking and Warehousing                            | 42            | 137     | 182     | 45     | 32.8%             |
| Water Transportation                                | 44            | 7       | 6       | (1)    | -14.3%            |
| Transportation by Air                               | 45            | 22      | 53      | 31     | 140.9%            |
| Pipelines, Except Natural Gas                       | 46            |         |         |        |                   |
| Transportation Services                             | 47            | 19      | 22      | 3      | 15.8%             |
| Communications                                      | 48            | 927     | 698     | (229)  | -24.7%            |
| Electric, Gas, and Sanitary Services                | 49            | 163     | 159     | (4)    | -2.5%             |
| Wholesale Trade                                     |               | 640     | 661     | 21     | 3.3%              |
| Durable Goods                                       | 50            | 380     | 378     | (2)    | -0.5%             |
| Non-durable Goods                                   | 51            | 258     | 281     | 23     | 8.9%              |
| Retail Trade                                        |               | 4,175   | 4,322   | 147    | 3.5%              |
| Building Materials and Hardware                     | 52            | 176     | 166     | (10)   | -5.7%             |
| General Merchandise Stores                          | 53            | 324     | 341     | 17     | 5.2%              |
| Food Stores                                         | 54            | 640     | 651     | 11     | 1.7%              |
| Automotive Dealers and Service Stations             | 55            | 479     | 438     | (41)   | -8.6%             |
| Apparel and Accessory Stores                        | 56            | 122     | 121     | (1)    | -0.8%             |
| Furniture and Home Furnishings Stores               | 57            | 143     | 167     | 24     | 16.8%             |
| Eating and Drinking Places                          | 58            | 1,843   | 1,975   | 132    | 7.2%              |
| Miscellaneous Retail                                | 59            | 440     | 456     | 16     | 3.6%              |
| Finance, Insurance, and Real Estate                 |               | E 1,198 | E 1,219 | E 21   | E 1.8%            |
| Banking                                             |               | 365     | 354     | (11)   | -3.0%             |
| Credit Agencies other than Banks                    | 61            | 161     | 161     | 0      | 0.0%              |
| Security, Commodity Brokers, and Services           | 62            | 30      | 42      | 12     | 40.0%             |
| Insurance Carriers                                  | 63            | 360     | 394     | 34     | 9.4%              |
| Insurance Agents, Brokers, and Services             | 64            | 124     | 99      | (25)   | -20.2%            |
| Real Estate                                         | 65            | 154     | 164     | 10     | 6.5%              |
| Combined Real Estate, Insurance, Etc.               | 66            | "0"     | "0"     | "0"    | "0"               |
| Holding and Other Investment Offices                | 67            | 4       | 5       | 1      | 25.0%             |
| Services                                            |               | E 4,732 | E 5,332 | E 600  | E 12.7%           |
| Hotels and Other Lodging Places                     | 70            | 354     | 411     | 57     | 16.1%             |
| Personal Services                                   | 72            | 193     | 220     | 27     | 14.0%             |
| Business Services                                   | 73            | 594     | 715     | 121    | 20.4%             |
| Auto Repair, Services, and Garages                  | 75            | 101     | 94      | (7)    | -6.9%             |
| Miscellaneous Repair Services                       | 76            | 47      | 51      | 4      | 8.5%              |
| Motion Pictures                                     | 78            | "0"     | "0"     | "0"    | "0"               |
| Amusement and Recreation Services                   | 79            | 178     | 189     | 11     | 6.2%              |
| Private Health Services                             | 80            | 1,427   | 1,693   | 266    | 18.6%             |
| Legal Services                                      | 81            | 156     | 161     | 5      | 3.2%              |
| Private Educational Services                        | 82            | 202     | 213     | 11     | 5.4%              |
| Private Social Services                             | 83            | 578     | 618     | 40     | 6.9%              |
| Museums, Art Galleries, Etc.                        | 84            |         |         |        |                   |
| Membership Organizations Including Tribal Gov't     | 86            | 516     | 545     | 29     | 5.6%              |
| Private Households                                  | 88            | 5       | 7       | 2      | 40.0%             |
| Engineering, Accounting, and Other Services         | 89            | 381     | 415     | 34     | 8.9%              |
| Non-Classifiable                                    |               | 99      |         |        |                   |
| Government                                          |               | 8,261   | 8,284   | 23     | 0.3%              |
| State                                               |               | 4,580   | 4,598   | 18     | 0.4%              |
| Local                                               |               | 2,273   | 2,253   | (20)   | -0.9%             |
| Federal                                             |               | 1,405   | 1,430   | 25     | 1.8%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

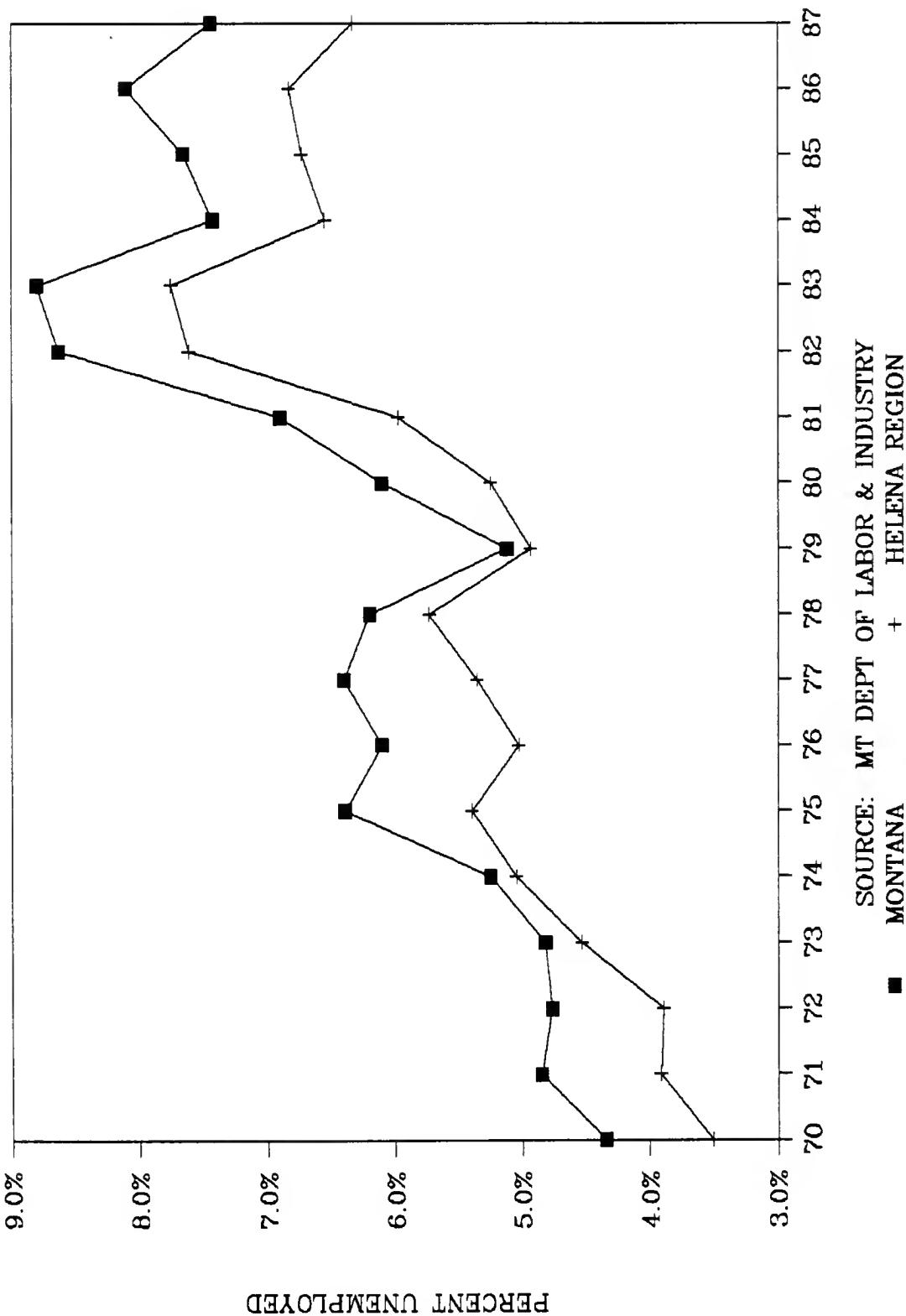
E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.44

## UNEMPLOYMENT RATE -- HELENA REGION

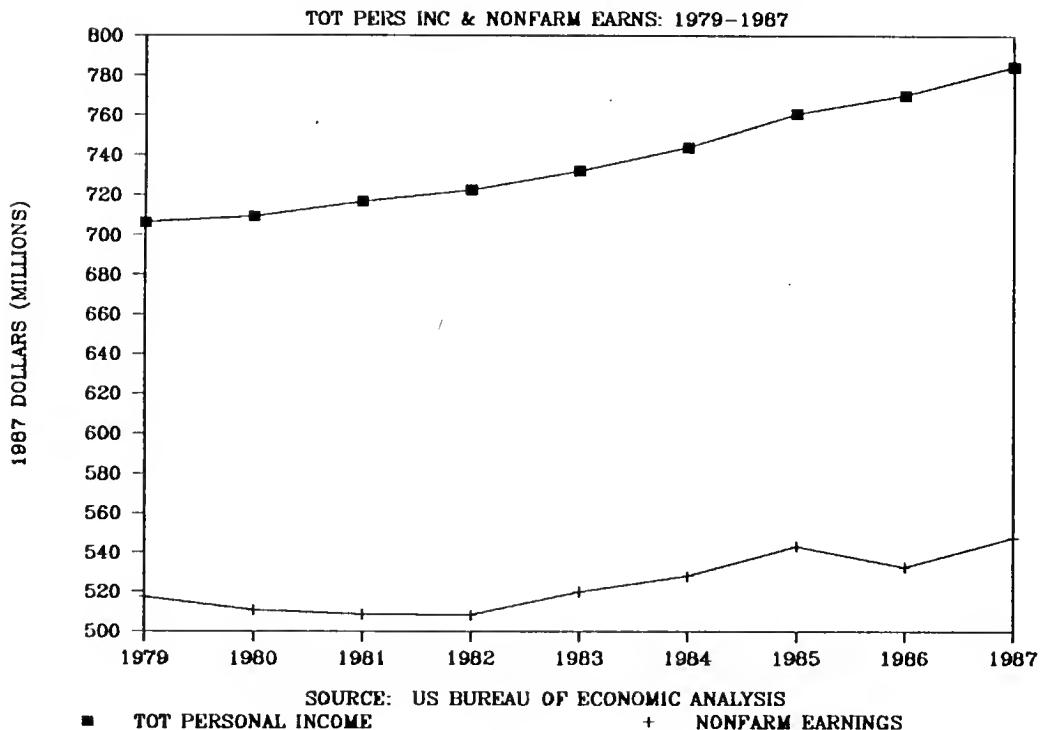
1970 - 1987



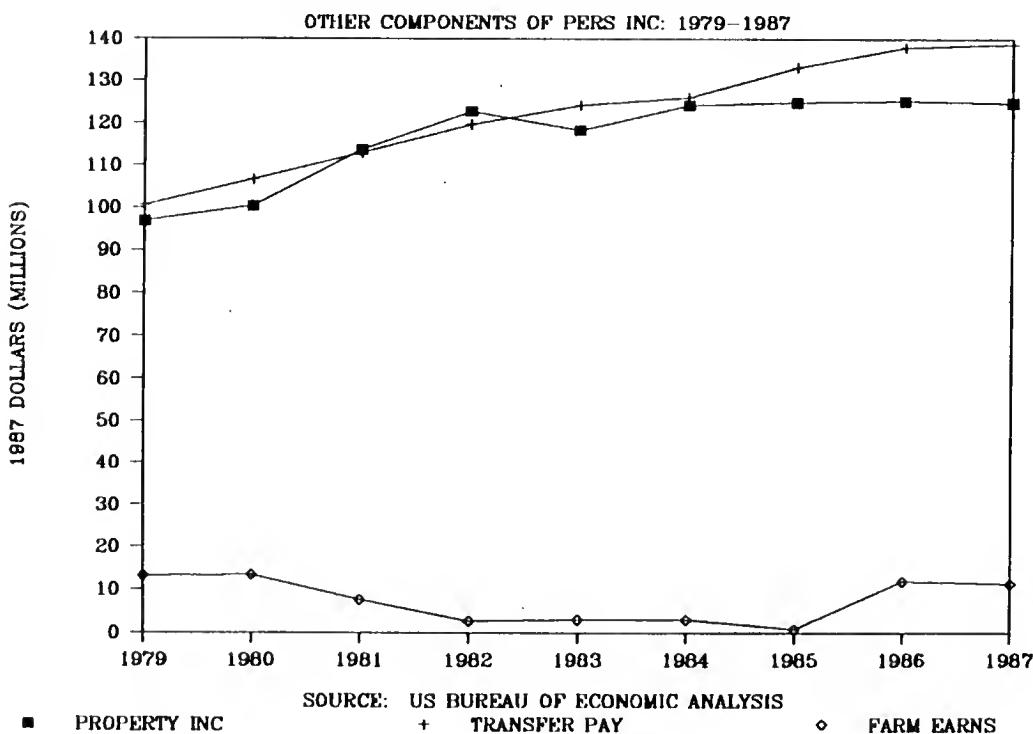
SOURCE: MT DEPT OF LABOR & INDUSTRY  
■ MONTANA + HELENA REGION

Figure 2.45

### INCOME -- HELENA REGION



### INCOME -- HELENA REGION



## The Kalispell Region

Located in northwestern Montana, the Kalispell Region includes Flathead, Lake, Lincoln, and Sanders counties.

### Labor Force

With more than 47,000 total jobs in 1986, the Kalispell Region ranked fourth among Montana's 12 regions (Table 2.34). Although more than half of these jobs were located in Flathead County, which ranked fifth in total jobs among counties, each of the other three counties contributed a significant number of jobs to the state's total, as is evidenced by their high county ranks. Jobs in the region accounted for 11.6 percent of total jobs in the state in 1986, up from 10.2 percent in 1969 (Figure 2.3).

As Figure 2.46 indicates, job growth in the Kalispell Region experienced periods of strong growth followed by stagnation or decline, a pattern similar to statewide job growth trends (Figure 2.9). The 1970s saw relatively strong growth, with both total and wage/salary jobs peaking in 1979. The 1980s began with steady declines in jobs, as much of the state succumbed to the national recession, but growth returned in 1983. Between 1984 and 1986, wage/salary jobs remained relatively constant, while self-employed growth led to an overall increase in total jobs similar to the statewide jobs experience. In 1987, growth in wage/salary jobs returned (Table 2.35).

Nearly all of the region's jobs increase after 1979 resulted from an increase in self-employment. Between 1979 and 1986, wage/salary jobs grew by only 2 percent. A 38 percent growth in self-employed, however, meant a total jobs increase of 10 percent (Table 2.5). In 1986, self-employment comprised 29 percent of the region's jobs, compared with a statewide average of 26 percent. (This regional statistic was up from 20 percent in 1969.)

The industrial composition of the Kalispell Region differs from the state in that its manufacturing sector, particularly in Flathead and Lincoln counties, is much larger. In 1969, manufacturing (primarily wood products) accounted for 25 percent of the wage/salary jobs in the region. By 1986, this figure had fallen to 17 percent, largely because of an increase in private services, but the statewide average of 7 percent illustrates this sector's regional importance. Other key sectors in the Kalispell Region include services, retail trade, and government--all important industries statewide.

Nearly all sectors in the region grew in the 1970s. Total jobs grew by more than 13,000 between 1969 and 1979, spurred by growth in state/local government, eating/drinking places, agriculture, primary metals processing, communications, and throughout the services industry (principally health, lodging, membership organizations, and social services). The only major jobs decline occurred in the heavy construction industry, following the completion of the Libby Dam in Lincoln County in the early 1970s.

After 1979, declines in manufacturing, construction, railroad transportation, and federal-civilian employment hindered growth. Within the manufacturing

sector, lumber/wood products and primary metal industries combined for a loss of more than 1,000 wage/salary jobs between 1979 and 1986. Private health services, eating/drinking places, mining (the opening of the Asarco silver mine in Lincoln County in 1981), and private business services provided considerable increases during this period. Total wage/salary jobs increased during the 1979-1986 period, despite declining between 1979-1982 and 1985-1986 (Figure 2.46).

The 1986-1987 period saw growth in the region's wage/salary jobs (Table 2.35). Strong performance in retail trade, lumber/wood products, and private business services offset declines in construction, and the entire region grew by nearly 800 wage/salary jobs. In addition, quarterly measures rather than yearly averages (which tend to "average out" growth that occurred in 1987 with the declines of 1986) show a stronger recovery in 1987. Between the fourth quarter of 1986 and the fourth quarter of 1987, wage/salary jobs increased by 4 percent, or nearly 1,200 jobs.

The Kalispell Region historically has had one of the highest unemployment rates in the state. In 1987 its 8.8 percent rate ranked last among Montana's regions. Figure 2.48 shows clearly the high unemployment rates of past years, with the region's rate following the statewide average, though at a higher level. A large part of the explanation for the region's high unemployment rates rests with the year-to-year changes and within-year seasonality of the lumber/wood products industry.

### Population

With a population of approximately 107,000 in 1987, the Kalispell Region was fourth largest in the state. Flathead County ranked fourth among the 56 counties, and the region's other counties all had relatively high ranks.

The region's population increased in every decade since first being counted in 1900, with particularly strong growth occurring after 1960 (Table 2.8). Between 1969 and 1986, population increased every year (Figure 2.47), and the growth of 37.5 percent during this period was one of the highest in the state. During this same period, a loose relationship between total jobs and population existed with population growth slowing whenever total jobs declined (e.g. 1979-1982). Estimates for 1987 suggest zero population growth.

### Income

The Kalispell Region also ranked fourth in the state in total personal income and nonfarm earnings in 1986. Property income and transfer payments ranked third in the state, while farm earnings ranked 10th. Flathead, Lake, and Lincoln counties all had relatively high income rankings in 1986.

Figure 2.49 illustrates the relationship between total personal income and nonfarm earnings, with both measures moving together for most of the 1979-1987 period. Nonfarm earnings followed the wage/salary jobs pattern during this period, declining dramatically with the 1980-1982 recession. Recovery in 1983 and 1984 produced strong growth in total personal income, but growth

in 1985-1986 slowed as nonfarm earnings declined slightly. An increase in nonfarm worker earnings returned in 1987, associated with an increase in nonfarm wage/salary jobs described above.

Farm earnings basically followed the statewide trends between 1979 and 1987, declining sharply between 1980 and 1985. But because the agricultural sector is very small in this region, the substantial percentage decline in farm earnings between 1980 and 1985 was not critical to total personal income growth. Offsetting growth in property income and transfer payments during this period also helped obscure the decline. Because nonfarm earnings declined slightly in 1986, however, agriculture's recovery translated into personal income growth.

The Kalispell Region ranked 11th in per capita income for the 1982-1986 period. Although Flathead County ranked relatively high among counties at 14th, Lake, Lincoln, and Sanders counties all ranked quite low (Table 2.34). Consequently, regional per capita income was consistently below the state average between 1979 and 1987 (Table 2.16).

Figure 2.46

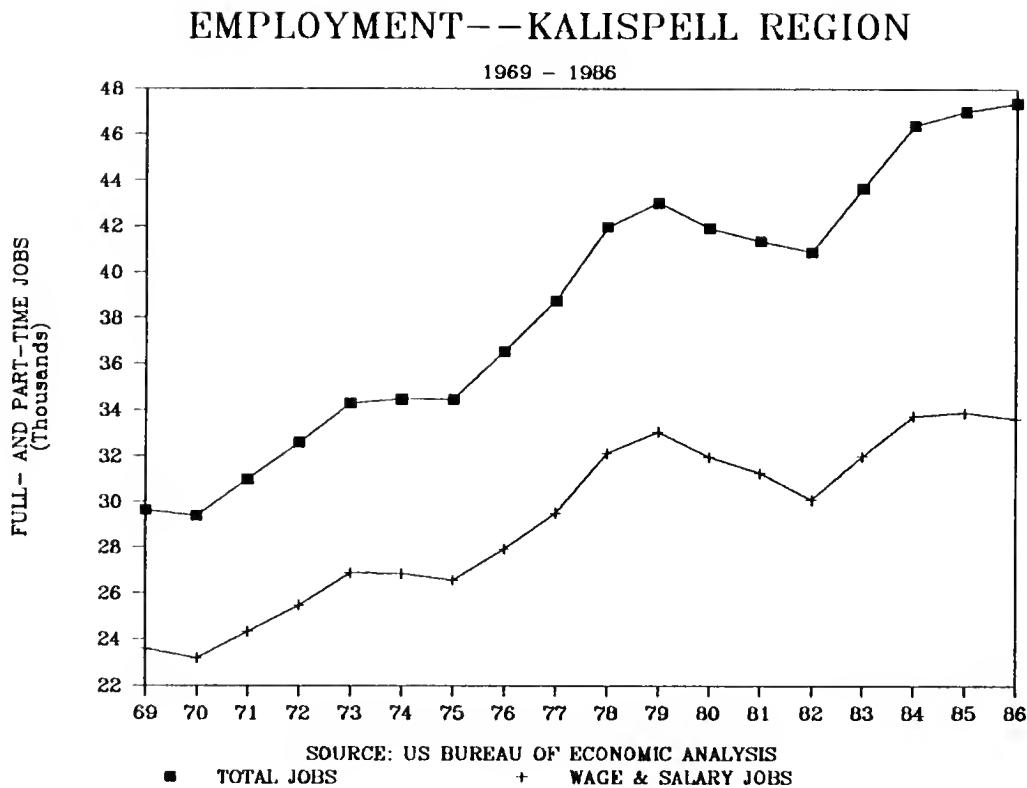


Figure 2.47

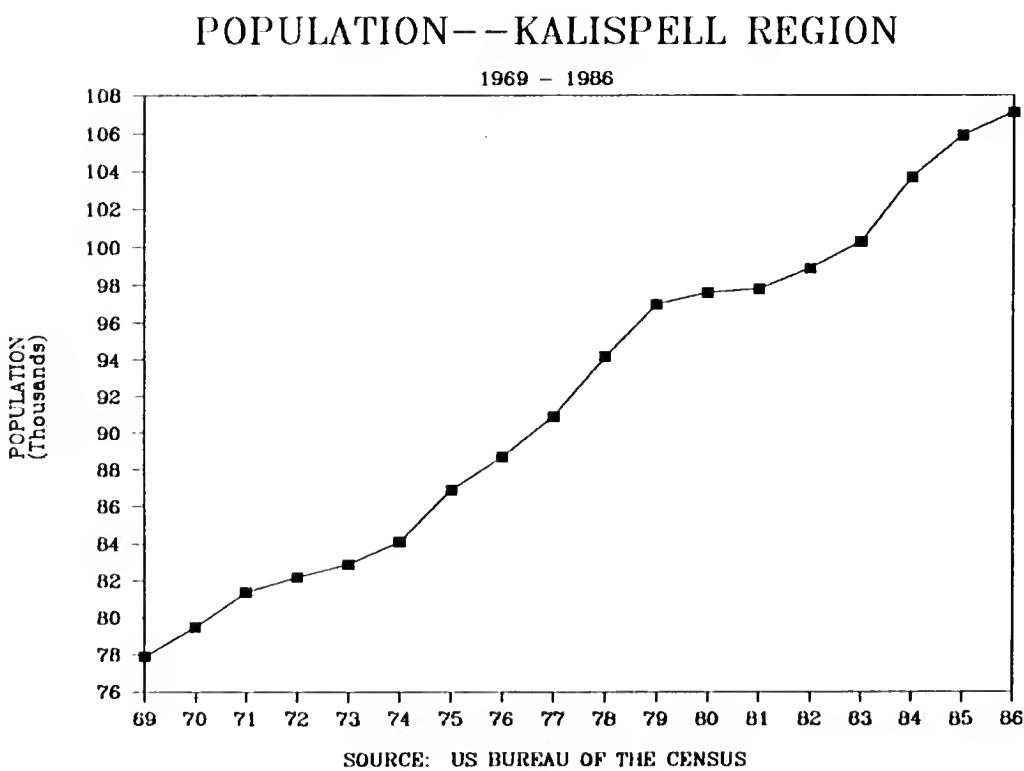


Table 2.34

|                                           | The Kalispell Region |         |           |           |           |           |           |           |           |           |           | Rank in State /d   |
|-------------------------------------------|----------------------|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------------|
|                                           | 1959                 | 1969    | 1979      | 1980      | 1981      | 1982      | 1983      | 1984      | 1985      | 1986      | 1987 /p   | (Region or County) |
| <b>Population /a</b>                      |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 64,900               | 77,900  | 97,000    | 97,600    | 97,800    | 98,900    | 100,300   | 103,700   | 105,900   | 107,100   | 107,000   | 4                  |
| Flathead                                  | 32,700               | 38,900  | 51,500    | 52,000    | 52,100    | 52,400    | 53,300    | 55,500    | 57,300    | 58,300    | 58,200    | 4                  |
| Lake                                      | 13,000               | 14,300  | 18,600    | 19,100    | 19,200    | 19,400    | 19,700    | 20,300    | 20,700    | 20,900    | 21,000    | 9                  |
| Lincoln                                   | 12,400               | 17,600  | 17,900    | 17,600    | 17,800    | 18,100    | 18,300    | 18,700    | 18,800    | 19,000    | 19,000    | 10                 |
| Sanders                                   | 6,800                | 7,100   | 9,000     | 8,700     | 8,700     | 9,000     | 9,000     | 9,200     | 9,100     | 8,900     | 8,800     | 23                 |
| <b>Total Jobs /b</b>                      |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                  | 29,641  | 43,029    | 41,930    | 41,351    | 40,892    | 43,658    | 46,386    | 47,012    | 47,379    | ...       | 4                  |
| Flathead                                  | ...                  | 14,976  | 24,852    | 24,308    | 23,716    | 23,396    | 25,101    | 27,401    | 28,127    | 28,074    | ...       | 5                  |
| Lake                                      | ...                  | 4,639   | 6,881     | 6,767     | 6,928     | 7,079     | 7,387     | 7,666     | 8,105     | 8,243     | ...       | 10                 |
| Lincoln                                   | ...                  | 7,411   | 7,399     | 6,948     | 7,024     | 6,852     | 7,397     | 7,393     | 7,357     | 7,590     | ...       | 11                 |
| Sanders                                   | ...                  | 2,615   | 3,897     | 3,907     | 3,683     | 3,565     | 3,773     | 3,926     | 3,423     | 3,472     | ...       | 25                 |
| <b>Wage &amp; Salary Jobs /b</b>          |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                  | 23,573  | 33,045    | 31,968    | 31,240    | 30,099    | 31,973    | 33,726    | 33,879    | 33,604    | ...       | 4                  |
| Flathead                                  | ...                  | 12,193  | 19,698    | 19,193    | 18,514    | 17,834    | 18,962    | 20,562    | 20,989    | 20,568    | ...       | 5                  |
| Lake                                      | ...                  | 2,980   | 4,586     | 4,461     | 4,603     | 4,632     | 4,810     | 4,926     | 5,289     | 5,326     | ...       | 10                 |
| Lincoln                                   | ...                  | 6,479   | 5,904     | 5,445     | 5,514     | 5,198     | 5,608     | 5,536     | 5,434     | 5,564     | ...       | 9                  |
| Sanders                                   | ...                  | 1,921   | 2,857     | 2,869     | 2,609     | 2,435     | 2,593     | 2,702     | 2,107     | 2,166     | ...       | 25                 |
| <b>Unemployment Rate /c</b>               |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                  | 7.3%    | 7.2%      | 9.4%      | 10.7%     | 13.7%     | 10.8%     | 9.0%      | 9.5%      | 9.9%      | 8.8%      | 12                 |
| Flathead                                  | ...                  | 7.0%    | 8.6%      | 8.3%      | 10.1%     | 12.9%     | 10.5%     | 7.7%      | 8.5%      | 9.0%      | 8.1%      | 36                 |
| Lake                                      | ...                  | 6.7%    | 6.0%      | 7.4%      | 7.9%      | 9.7%      | 8.3%      | 7.8%      | 8.2%      | 9.4%      | 7.8%      | 34                 |
| Lincoln                                   | ...                  | 8.9%    | 10.4%     | 15.4%     | 15.0%     | 19.4%     | 13.4%     | 12.8%     | 11.8%     | 11.5%     | 10.8%     | 52                 |
| Sanders                                   | ...                  | 6.0%    | 7.9%      | 9.7%      | 11.5%     | 16.0%     | 12.6%     | 12.4%     | 16.6%     | 15.5%     | 12.9%     | 55                 |
| <b>Total Personal Income (\$1000s) /b</b> |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 480,858              | 689,941 | 1,135,365 | 1,088,855 | 1,077,124 | 1,046,769 | 1,110,956 | 1,160,645 | 1,162,918 | 1,178,512 | 1,190,000 | 4                  |
| Flathead                                  | 254,983              | 367,521 | 675,835   | 650,335   | 639,455   | 620,296   | 657,919   | 700,739   | 704,309   | 701,784   | ...       | 4                  |
| Lake                                      | 71,489               | 101,776 | 185,227   | 183,096   | 179,729   | 177,603   | 187,791   | 194,936   | 201,669   | 213,326   | ...       | 10                 |
| Lincoln                                   | 110,047              | 168,014 | 188,607   | 170,721   | 177,385   | 170,117   | 183,796   | 179,781   | 178,496   | 182,462   | ...       | 11                 |
| Sanders                                   | 44,319               | 52,630  | 85,696    | 84,703    | 80,555    | 78,753    | 81,451    | 85,189    | 78,644    | 80,940    | ...       | 29                 |
| <b>Per Capita Personal Income /b</b>      |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 7,409                | 8,851   | 11,705    | 11,159    | 11,002    | 10,590    | 11,067    | 11,192    | 10,983    | 11,009    | 11,100    | 11                 |
| Flathead                                  | 7,798                | 9,441   | 13,121    | 12,501    | 12,262    | 11,841    | 12,338    | 12,658    | 12,298    | 12,036    | ...       | 14                 |
| Lake                                      | 5,499                | 7,094   | 9,966     | 9,592     | 9,367     | 9,162     | 9,516     | 9,594     | 9,728     | 10,216    | ...       | 49                 |
| Lincoln                                   | 8,875                | 9,554   | 10,520    | 9,606     | 9,953     | 9,421     | 10,042    | 9,609     | 9,504     | 9,612     | ...       | 50                 |
| Sanders                                   | 6,517                | 7,424   | 9,545     | 9,745     | 9,216     | 8,729     | 9,025     | 9,236     | 8,620     | 9,119     | ...       | 54                 |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 367,719              | 530,822 | 789,440   | 716,627   | 690,504   | 640,635   | 690,257   | 736,441   | 729,964   | 724,697   | 737,000   | 4                  |
| Flathead                                  | 182,225              | 276,482 | 492,867   | 451,420   | 428,256   | 395,914   | 425,597   | 465,965   | 464,501   | 455,227   | ...       | 5                  |
| Lake                                      | 37,567               | 54,856  | 90,443    | 82,967    | 82,576    | 80,529    | 86,971    | 89,586    | 96,479    | 97,587    | ...       | 12                 |
| Lincoln                                   | 97,398               | 164,280 | 150,871   | 128,777   | 134,053   | 120,966   | 136,789   | 131,164   | 127,817   | 130,631   | ...       | 9                  |
| Sanders                                   | 30,530               | 35,203  | 55,259    | 53,463    | 47,618    | 43,226    | 46,900    | 49,726    | 41,147    | 41,251    | ...       | 25                 |
| <b>Farm Earnings (\$1000s) /b</b>         |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 28,551               | 24,075  | 24,623    | 29,086    | 14,555    | 7,152     | 4,656     | 7,394     | 7,728     | 22,989    | 22,000    | 10                 |
| Flathead                                  | 11,151               | 9,108   | 5,821     | 9,432     | 5,909     | 4,764     | 4,897     | 5,502     | 7,141     | 10,472    | ...       | 15                 |
| Lake                                      | 11,902               | 10,289  | 12,170    | 13,725    | 4,354     | (955)     | (2,796)   | (1,249)   | (2,189)   | 7,517     | ...       | 26                 |
| Lincoln                                   | 1,891                | 1,323   | 1,415     | 1,149     | 777       | 773       | 522       | 787       | 685       | 1,230     | ...       | 54                 |
| Sanders                                   | 3,607                | 3,355   | 5,217     | 4,780     | 3,514     | 2,569     | 2,033     | 2,355     | 2,090     | 3,771     | ...       | 44                 |
| <b>Property Income (\$1000s) /b</b>       |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 63,920               | 84,256  | 182,719   | 189,068   | 210,559   | 218,485   | 225,239   | 232,625   | 233,912   | 234,115   | 233,000   | 3                  |
| Flathead                                  | 37,437               | 47,086  | 108,855   | 112,705   | 125,675   | 128,773   | 133,537   | 139,161   | 139,241   | 139,285   | ...       | 4                  |
| Lake                                      | 13,286               | 18,234  | 41,405    | 43,292    | 48,466    | 51,319    | 54,107    | 55,460    | 55,073    | 54,945    | ...       | 9                  |
| Lincoln                                   | 7,225                | 11,743  | 18,996    | 18,902    | 20,528    | 21,992    | 21,822    | 21,854    | 22,559    | 22,809    | ...       | 22                 |
| Sanders                                   | 5,971                | 7,193   | 13,463    | 14,169    | 15,890    | 16,401    | 15,773    | 16,151    | 17,038    | 17,077    | ...       | 30                 |
| <b>Transfer Payments (\$1000s) /b</b>     |                      |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 52,081               | 76,871  | 171,215   | 184,376   | 193,667   | 212,732   | 218,166   | 221,812   | 231,966   | 238,581   | 240,000   | 3                  |
| Flathead                                  | 29,002               | 40,747  | 90,760    | 97,245    | 102,075   | 111,215   | 115,203   | 115,421   | 120,501   | 123,938   | ...       | 4                  |
| Lake                                      | 9,434                | 16,243  | 35,974    | 38,320    | 40,995    | 44,111    | 46,008    | 48,023    | 50,416    | 52,058    | ...       | 9                  |
| Lincoln                                   | 7,058                | 11,670  | 27,580    | 31,084    | 31,863    | 35,971    | 35,034    | 35,988    | 37,592    | 38,566    | ...       | 11                 |
| Sanders                                   | 5,986                | 8,211   | 16,901    | 17,728    | 18,733    | 21,435    | 21,921    | 22,380    | 23,457    | 24,020    | ...       | 17                 |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.35 WAGE &amp; SALARY EMPLOYMENT IN THE KALISPELL REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987   | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|--------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 29,979  | 30,759 | 780    | 2.6%              |
| Total Private                                       |               | 23,641  | 24,351 | 710    | 3.0%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 461         | E 505   | E 44   | E 9.5% |                   |
| Agricultural Production--Crops ***                  | 01            | 145     | 176    | 31     | 21.4%             |
| Agricultural Production--Livestock ***              | 02            | 80      | 94     | 14     | 17.5%             |
| Agricultural Services                               | 07            | 102     | 107    | 5      | 4.9%              |
| Forestry                                            | 08            | 134     | 128    | (6)    | -4.5%             |
| Fishing, Hunting, and Trapping                      | 09            | "0"     | "0"    | "0"    | "0"               |
| Mining                                              |               | 574     | 561    | (13)   | -2.3%             |
| Metal Mining                                        | 10            | 377     | 381    | 4      | 1.1%              |
| Coal Mining                                         | 12            |         |        |        |                   |
| Oil and Gas Extraction                              | 13            | 12      | 8      | (4)    | -33.3%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 180     | 169    | (11)   | -6.1%             |
| Construction                                        |               | 1,175   | 976    | (199)  | -16.9%            |
| General Building Contractors                        | 15            | 321     | 256    | (65)   | -20.2%            |
| Heavy Construction Contractors                      | 16            | 332     | 289    | (43)   | -13.0%            |
| Special Trade Contractors                           | 17            | 518     | 427    | (91)   | -17.6%            |
| Manufacturing                                       |               | 5,615   | 5,883  | 268    | 4.8%              |
| Food and Kindred Products                           | 20            | 82      | 108    | 26     | 31.7%             |
| Textile Mill Products                               | 22            |         |        |        |                   |
| Apparel and Other Textile Products                  | 23            | "0"     | "0"    | "0"    | "0"               |
| Lumber and Wood Products                            | 24            | 3,937   | 4,148  | 211    | 5.4%              |
| Furniture and Fixtures                              | 25            | "0"     | "0"    | "0"    | "0"               |
| Paper and Allied Products                           | 26            |         |        |        |                   |
| Printing and Publishing                             | 27            | 212     | 215    | 3      | 1.4%              |
| Chemicals and Allied Products                       | 28            | "0"     | "0"    | "0"    | "0"               |
| Petroleum Refining and Related Industries           | 29            |         |        |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            | "0"     | "0"    | "0"    | "0"               |
| Leather and Leather Products                        | 31            | 6       | 10     | 4      | 66.7%             |
| Stone, Clay, Glass, and Concrete Products           | 32            | 100     | 95     | (5)    | -5.0%             |
| Primary Metals Processing                           | 33            | 853     | 826    | (27)   | -3.2%             |
| Fabricated Metal Products                           | 34            | 63      | 132    | 69     | 109.5%            |
| Machinery, Except Electrical                        | 35            | 204     | 204    | 0      | 0.0%              |
| Electrical and Electronic Equipment                 | 36            | 50      | 64     | 14     | 28.0%             |
| Transportation Equipment                            | 37            | 55      | 35     | (20)   | -36.4%            |
| Instruments and Related Products                    | 38            | "0"     | "0"    | "0"    | "0"               |
| Miscellaneous Manufacturing Industries              | 39            | 11      | 15     | 4      | 36.4%             |
| Transportation and Public Utilities                 |               | 1,405   | 1,339  | (66)   | -4.7%             |
| Local and Interurban Passenger Transit              | 41            | 144     | 135    | (9)    | -6.3%             |
| Trucking and Warehousing                            | 42            | 447     | 445    | (2)    | -0.4%             |
| Water Transportation                                | 44            | 6       | (6)    | (1)    | -100.0%           |
| Transportation by Air                               | 45            | 54      | 61     | 7      | 13.0%             |
| Pipelines, Except Natural Gas                       | 46            |         |        |        |                   |
| Transportation Services                             | 47            | 73      | 78     | 5      | 6.8%              |
| Communications                                      | 48            | 400     | 345    | (55)   | -13.8%            |
| Electric, Gas, and Sanitary Services                | 49            | 274     | 263    | (11)   | -4.0%             |
| Wholesale Trade                                     |               | 834     | 848    | 14     | 1.7%              |
| Durable Goods                                       | 50            | 376     | 402    | 26     | 6.9%              |
| Non-durable Goods                                   | 51            | 454     | 442    | (12)   | -2.6%             |
| Retail Trade                                        |               | 5,959   | 6,253  | 294    | 4.9%              |
| Building Materials and Hardware                     | 52            | 380     | 414    | 34     | 8.9%              |
| General Merchandise Stores                          | 53            | 359     | 423    | 64     | 17.8%             |
| Food Stores                                         | 54            | 921     | 977    | 56     | 6.1%              |
| Automotive Dealers and Service Stations             | 55            | 835     | 853    | 18     | 2.2%              |
| Apparel and Accessory Stores                        | 56            | 236     | 267    | 31     | 13.1%             |
| Furniture and Home Furnishings Stores               | 57            | 196     | 218    | 22     | 11.2%             |
| Eating and Drinking Places                          | 58            | 2,353   | 2,392  | 39     | 1.7%              |
| Miscellaneous Retail                                | 59            | 666     | 697    | 31     | 4.7%              |
| Finance, Insurance, and Real Estate                 | E 1,152       | E 1,178 | E 26   | E 2.3% |                   |
| Banking                                             | 60            | 580     | 559    | (21)   | -3.6%             |
| Credit Agencies other than Banks                    | 61            | 122     | 138    | 16     | 13.1%             |
| Security, Commodity Brokers, and Services           | 62            | 15      | 15     | 0      | 0.0%              |
| Insurance Carriers                                  | 63            | 20      | 22     | 2      | 10.0%             |
| Insurance Agents, Brokers, and Services             | 64            | 170     | 181    | 11     | 6.5%              |
| Real Estate                                         | 65            | 232     | 253    | 21     | 9.1%              |
| Combined Real Estate, Insurance, Etc.               | 66            | "0"     | "0"    | "0"    | "0"               |
| Holding and Other Investment Offices                | 67            | 13      | 10     | (3)    | -23.1%            |
| Services                                            | E 6,402       | E 6,732 | E 330  | E 5.2% |                   |
| Hotels and Other Lodging Places                     | 70            | 887     | 899    | 12     | 1.4%              |
| Personal Services                                   | 72            | 330     | 320    | (10)   | -3.0%             |
| Business Services                                   | 73            | 466     | 628    | 162    | 34.8%             |
| Auto Repair, Services, and Garages                  | 75            | 125     | 154    | 29     | 23.2%             |
| Miscellaneous Repair Services                       | 76            | 64      | 66     | 2      | 3.1%              |
| Motion Pictures                                     | 78            | 71      | 78     | 7      | 9.9%              |
| Amusement and Recreation Services                   | 79            | 265     | 281    | 16     | 6.0%              |
| Private Health Services                             | 80            | 2,572   | 2,600  | 28     | 1.1%              |
| Legal Services                                      | 81            | 155     | 188    | 33     | 21.3%             |
| Private Educational Services                        | 82            | 259     | 267    | 8      | 3.1%              |
| Private Social Services                             | 83            | 381     | 420    | 39     | 10.2%             |
| Museums, Art Galleries, Etc.                        | 84            | "0"     | "0"    | "0"    | "0"               |
| Membership Organizations Including Tribal Gov't     | 86            | 600     | 611    | 11     | 1.8%              |
| Private Households                                  | 88            | 48      | 48     | 0      | 0.0%              |
| Engineering, Accounting, and Other Services         | 89            | 179     | 172    | (7)    | -3.9%             |
| Non-Classifiable                                    | 99            | 1       | 1      | 0      | 0.0%              |
| Government                                          |               | 6,338   | 6,404  | 66     | 1.0%              |
| State                                               |               | 686     | 697    | 11     | 1.6%              |
| Local                                               |               | 3,954   | 3,941  | (13)   | -0.3%             |
| Federal                                             |               | 1,693   | 1,764  | 71     | 4.2%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

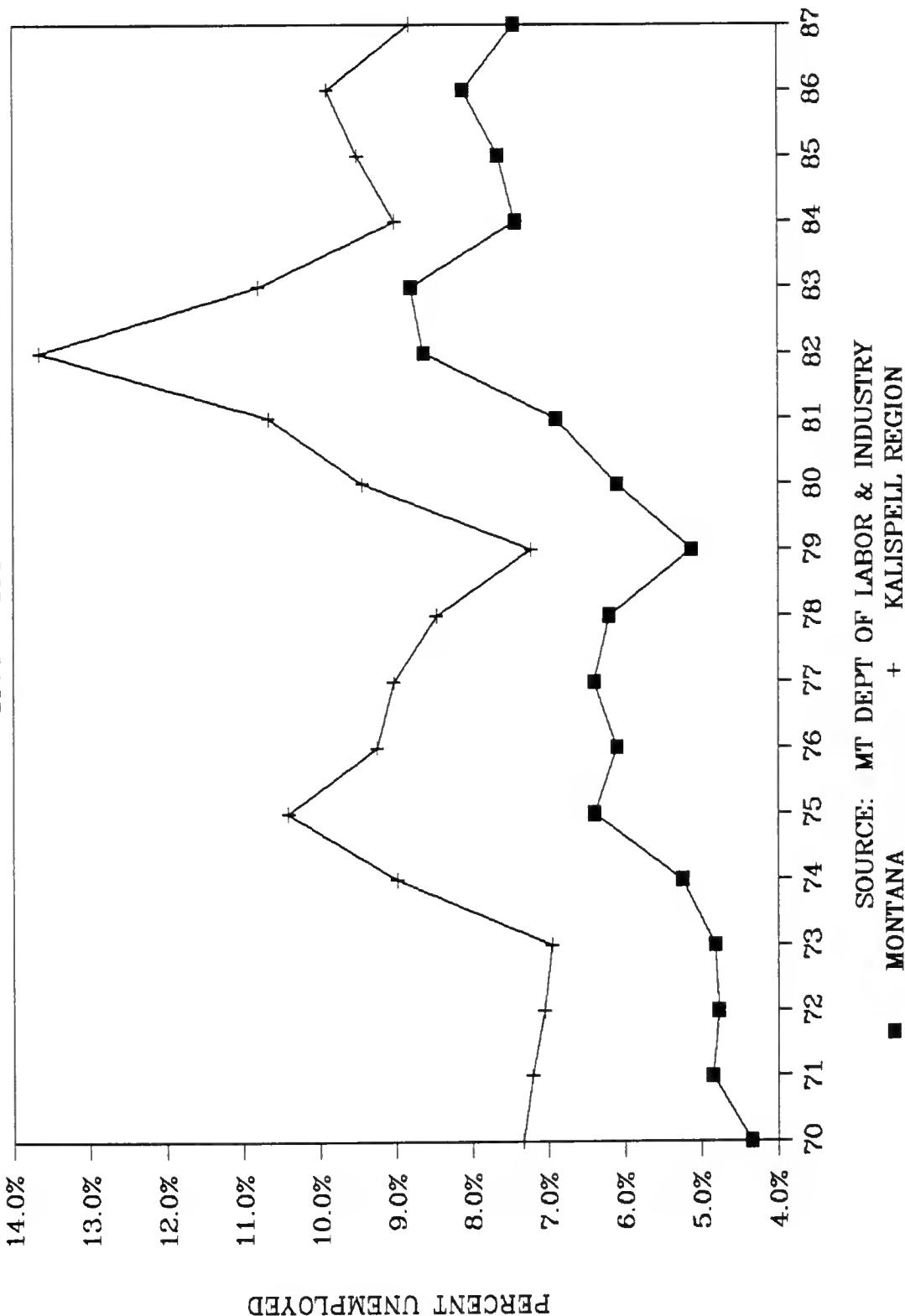
E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.48

## UNEMPLOYMENT RATE--KALISPELL REG

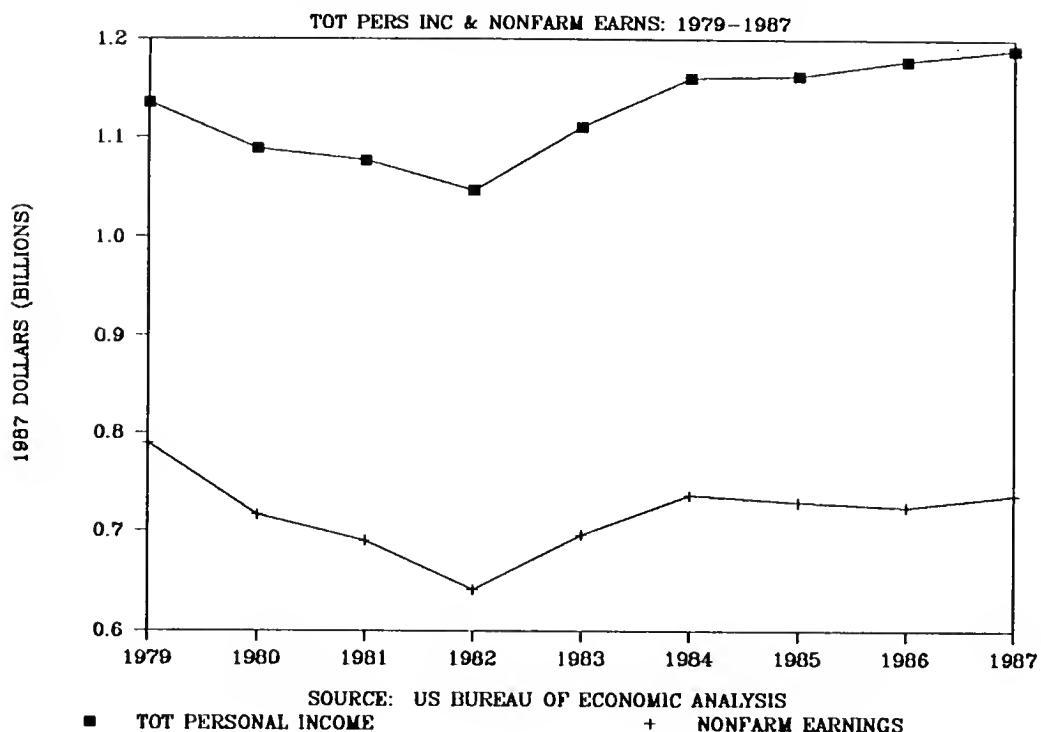
1970 - 1987



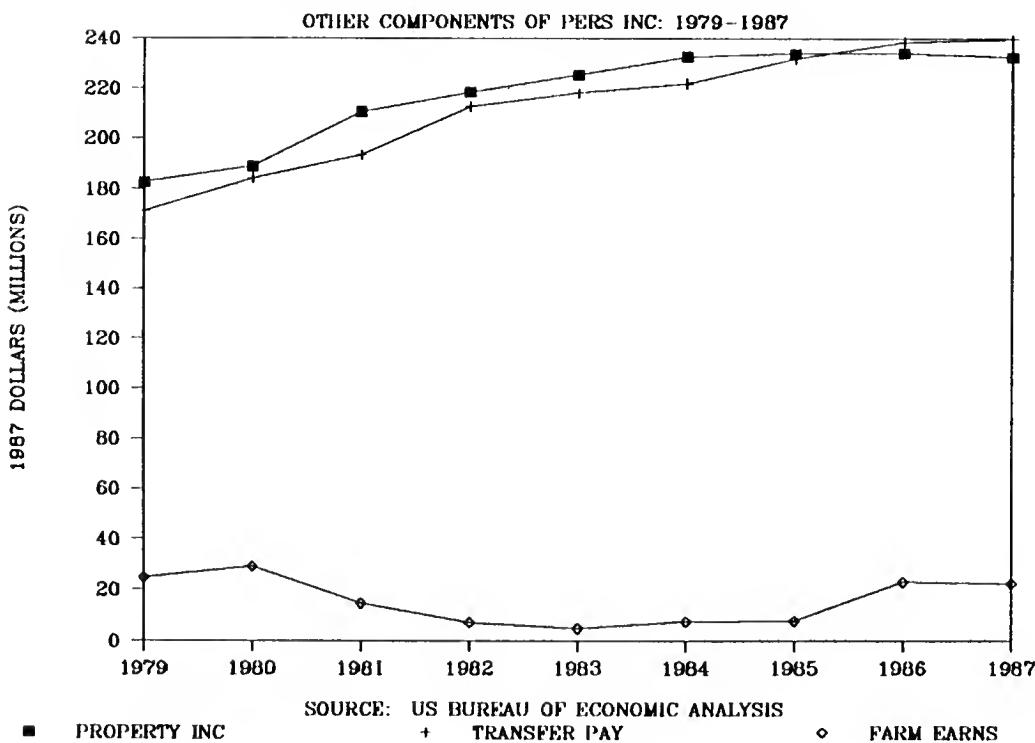
SOURCE: MT DEPT OF LABOR & INDUSTRY  
■ MONTANA + KALISPELL REGION

Figure 2.49

### INCOME -- KALISPELL REGION



### INCOME -- KALISPELL REGION



## The Lewistown Region

The Lewistown Region is located in central Montana and includes Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum, and Wheatland counties.

### Labor Force

The Lewistown Region ranked last in the state in total jobs, in wage/salary jobs, and in population in 1986 (Table 2.36). In 1986, Fergus County accounted for more than half of the region's jobs and ranked 15th in the state for total jobs. The region's 11,000 total jobs accounted for 2.7 percent of the total number of statewide jobs, down from 3.5 percent in 1969 (Figure 2.3).

Job growth between 1969 and 1986 was relatively small, with the region's total jobs increasing by only 8 percent, which was the third smallest percentage growth in the state. Between 1969 and 1979, total jobs experienced moderate growth, with the only exception occurring during the 1975 statewide economic stagnation. Between 1979 and 1986, wage/salary jobs declined steadily, posting a loss of 11 percent. Because of a 16 percent self-employed growth during this same period, however, only a slight decline in total jobs occurred (Figure 2.50 and Table 2.5). By 1986 self-employment accounted for 42 percent of all regional jobs, compared with a statewide average of 26 percent. In 1987, wage/salary jobs remained basically unchanged.

The importance of the self-employed to the Lewistown Region reflects in part the large share of jobs in the region devoted to agriculture. In 1969, agriculture accounted for 31 percent of all jobs in the region, and, falling to 24 percent by 1986, this share was still remarkably larger than the statewide average of 9 percent. Other key sectors in the region--government, services, and retail trade--reflect importance statewide.

Growth in wage/salary jobs during the 1970s was led by strong performance in private health services, eating/drinking places, government (excluding military), construction, lumber/wood products, food stores, and oil/gas extraction. Notable declines included agriculture, the military, and railroad transportation.

Between 1979 and 1986, declines in every major sector of the economy occurred, with retail trade, oil/gas extraction, construction, and federal agencies experiencing the largest job losses. Sectoral wage/salary job growth during this period was virtually nonexistent, although by 1984 several sectors, such as government and construction, had begun to grow slightly. Between 1986 and 1987, more job growth occurred, with health and other professional services and mining posting gains. Declines in manufacturing (closure of the gypsum processing facility near Lewistown) and construction, however, more than offset these gains, and total wage/salary jobs declined yearly between 1986-1987 (Table 2.37). Comparing the fourth quarters of 1986 and 1987 instead of yearly averages provides a slightly different picture: wage/salary jobs actually increased by more than 75 jobs, indicating the start of an economic recovery fueled, in part, by increased metal mining activity.

In 1987, the region's high unemployment rate of 8.7 percent was the second highest rate in the state, with only Judith Basin County having an unemployment rate below the state average of 7.4 percent. Prior to 1986, however, the unemployment rate in the Lewistown Region was generally well below that of the state, (Figure 2.52).

### Population

Early, quick growth characterized the Lewistown Region between 1890 and 1920, when population peaked at just under 46,000 (Table 2.8). Since that time, population has declined in every decade except the 1970s, producing the smallest regional population in 1987 at just over 23,000.

Figure 2.51 illustrates graphically the more recent changes in population between 1969 and 1986. Comparing this graph with Figure 2.50, the general relationship between jobs and population appears to hold. Growth in total jobs during the 1970s was followed by population growth after 1972. Total jobs remained fairly constant during the 1980s, as did population. The decline in population in 1986 and 1987 partially reflected the decrease in wage/salary jobs between 1981 and 1986 as well as the generally rising unemployment rate over the same period.

### Income

Total personal income in the Lewistown Region ranked last in the state in 1986, consistent with population and jobs rankings. The income components generally also ranked very low, although farm earnings were relatively high at eighth, indicating the importance of agriculture.

Two major trends in income occurred between 1979 and 1987 in the Lewistown Region (Figure 2.53). First, total personal income experienced the second largest decline in the state (Table 2.10) because of steady decline in nonfarm earnings throughout the period and the net decline of farm earnings after a peak in 1979. Second, despite the steady performance of nonfarm earnings between 1979 and 1987, total personal income was very unstable because of the importance of the extremely volatile farm earnings component. A comparison of farm earnings changes reveals that they were mirrored by changes in total personal income. Farm earnings changes were very similar to those at the state level, with a dramatic decline occurring between 1981 and 1985. This decline produced negative farm earnings in 1985. A strong recovery occurred in 1986, however, translating into a temporary rise in total income. Throughout this entire period, property income and transfer payments followed statewide trends and increased slightly (Tables 2.9 and 2.36).

The Lewistown Region ranked 10th in per capita income for the 1982-1986 period, reflecting four-out-of-five bad farm years. A careful look at per capita income for this region reveals that the changes closely followed farm earnings changes for the entire 1979-1987 period--another statement about the importance of agriculture to the region's economic performance (Table 2.36).

Figure 2.50

### EMPLOYMENT--LEWISTOWN REGION

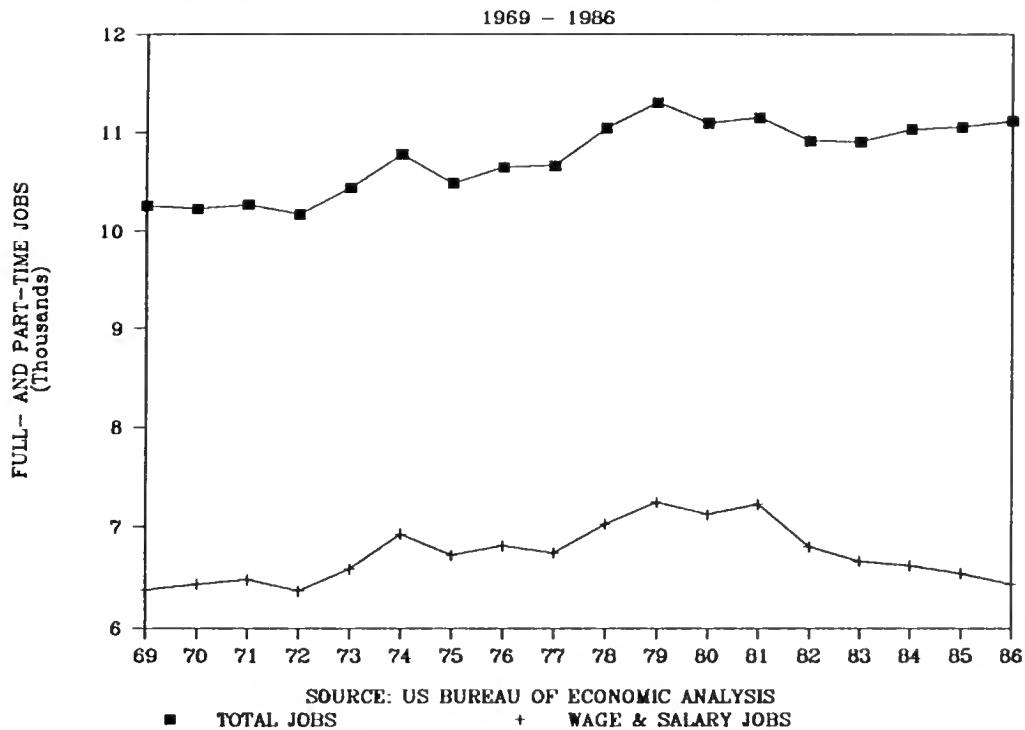
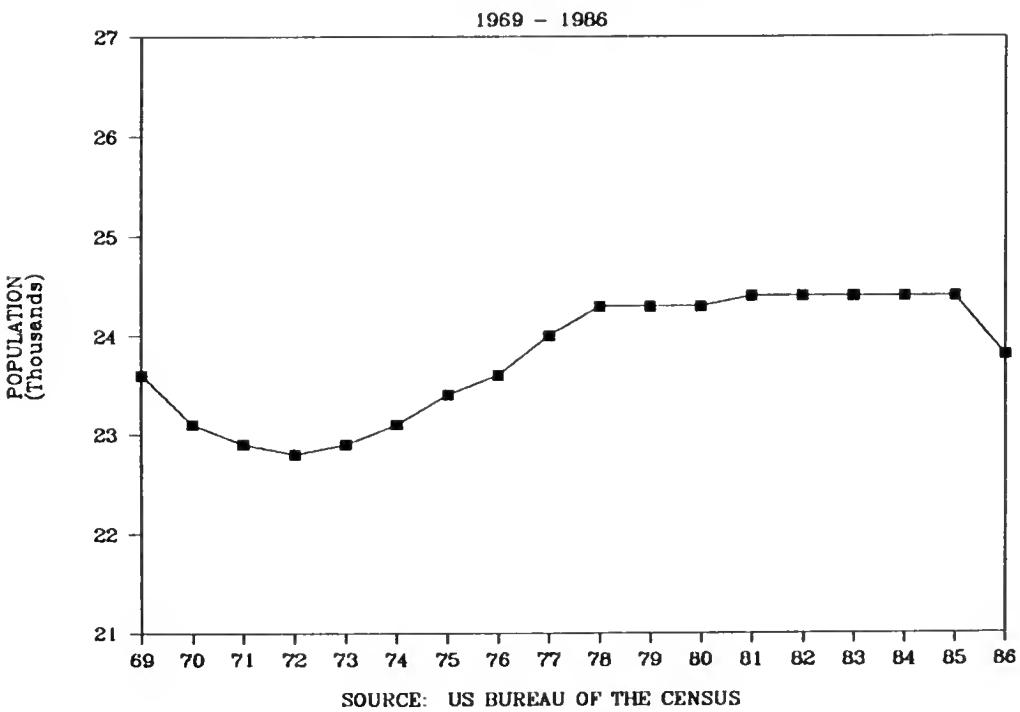


Figure 2.51

### POPULATION--LEWISTOWN REGION



The Lewistown Region

Table 2.36

|                                           | 1959               | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987    | /p | Rank in State /d |
|-------------------------------------------|--------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----|------------------|
|                                           | (Region or County) |         |         |         |         |         |         |         |         |         |         |    |                  |
| <b>Population /a</b>                      |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 26,900             | 23,600  | 24,300  | 26,300  | 26,400  | 24,400  | 24,400  | 24,400  | 24,400  | 23,800  | 23,200  | 12 |                  |
| Fergus                                    | 13,900             | 12,800  | 13,000  | 13,100  | 13,000  | 13,000  | 12,800  | 12,800  | 12,900  | 12,600  | 12,300  | 16 |                  |
| Golden Valley                             | 1,200              | 1,000   | 1,000   | 1,000   | 1,100   | 1,100   | 1,100   | 1,100   | 1,100   | 1,100   | 1,100   | 56 |                  |
| Judith Basin                              | 3,100              | 2,700   | 2,700   | 2,700   | 2,800   | 2,700   | 2,700   | 2,700   | 2,700   | 2,600   | 2,500   | 45 |                  |
| Musselshell                               | 4,800              | 3,800   | 4,600   | 4,500   | 4,400   | 4,600   | 4,800   | 4,800   | 4,800   | 4,700   | 4,500   | 37 |                  |
| Petroleum                                 | 900                | 700     | 700     | 700     | 700     | 700     | 700     | 700     | 700     | 600     | 600     | 56 |                  |
| Wheatland                                 | 3,000              | 2,600   | 2,300   | 2,300   | 2,200   | 2,300   | 2,300   | 2,300   | 2,200   | 2,200   | 2,200   | 48 |                  |
| <b>Total Jobs /b</b>                      |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | ...                | 10,262  | 11,304  | 11,095  | 11,155  | 10,919  | 10,912  | 11,037  | 11,061  | 11,119  | ...     | 12 |                  |
| Fergus                                    | ...                | 5,471   | 6,340   | 6,183   | 6,105   | 5,665   | 5,957   | 6,028   | 6,058   | 6,063   | ...     | 15 |                  |
| Golden Valley                             | ...                | 409     | 405     | 405     | 427     | 419     | 423     | 437     | 448     | 476     | ...     | 56 |                  |
| Judith Basin                              | ...                | 1,252   | 1,231   | 1,191   | 1,147   | 1,248   | 1,250   | 1,266   | 1,250   | 1,280   | ...     | 45 |                  |
| Musselshell                               | ...                | 1,524   | 1,913   | 1,944   | 2,109   | 2,047   | 1,950   | 1,931   | 1,956   | 1,895   | ...     | 37 |                  |
| Petroleum                                 | ...                | 378     | 318     | 292     | 281     | 270     | 278     | 275     | 273     | 279     | ...     | 56 |                  |
| Wheatland                                 | ...                | 1,228   | 1,097   | 1,080   | 1,056   | 1,070   | 1,054   | 1,100   | 1,096   | 1,126   | ...     | 48 |                  |
| <b>Wage &amp; Salary Jobs /b</b>          |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | ...                | 6,377   | 7,251   | 7,129   | 7,250   | 6,801   | 6,658   | 6,612   | 6,535   | 6,433   | ...     | 12 |                  |
| Fergus                                    | ...                | 3,566   | 4,373   | 4,282   | 4,217   | 3,909   | 3,918   | 3,659   | 3,627   | 3,746   | ...     | 19 |                  |
| Golden Valley                             | ...                | 163     | 174     | 173     | 194     | 180     | 177     | 193     | 203     | 226     | ...     | 55 |                  |
| Judith Basin                              | ...                | 396     | 593     | 365     | 599     | 616     | 572     | 562     | 566     | 577     | ...     | 49 |                  |
| Musselshell                               | ...                | 976     | 1,254   | 1,283   | 1,432   | 1,324   | 1,227   | 1,186   | 1,167   | 1,092   | ...     | 39 |                  |
| Petroleum                                 | ...                | 210     | 164     | 145     | 136     | 129     | 132     | 130     | 126     | 133     | ...     | 59 |                  |
| Wheatland                                 | ...                | 870     | 893     | 681     | 650     | 643     | 632     | 662     | 646     | 657     | ...     | 48 |                  |
| <b>Unemployment Rate /c</b>               |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | ...                | 3.7%    | 3.6%    | 4.4%    | 4.3%    | 7.6%    | 8.0%    | 8.9%    | 7.5%    | 8.4%    | 8.7%    | 11 |                  |
| Fergus                                    | ...                | 3.7%    | 3.6%    | 4.8%    | 5.2%    | 7.8%    | 7.3%    | 7.0%    | 8.1%    | 9.0%    | 8.8%    | 39 |                  |
| Golden Valley                             | ...                | 5.4%    | 4.2%    | 4.3%    | 3.4%    | 8.0%    | 9.4%    | 7.7%    | 7.3%    | 7.0%    | 9.1%    | 43 |                  |
| Judith Basin                              | ...                | 2.0%    | 8.1%    | 6.9%    | 2.8%    | 5.9%    | 7.8%    | 6.6%    | 6.7%    | 5.3%    | 5.3%    | 12 |                  |
| Musselshell                               | ...                | 5.0%    | 2.6%    | 2.3%    | 2.9%    | 8.9%    | 9.8%    | 7.2%    | 7.4%    | 10.6%   | 10.1%   | 50 |                  |
| Petroleum                                 | ...                | 2.9%    | 1.5%    | 3.9%    | 2.9%    | 3.9%    | 8.8%    | 6.0%    | 6.1%    | 7.0%    | 6.5%    | 8  |                  |
| Wheatland                                 | ...                | 3.2%    | 2.3%    | 3.7%    | 4.3%    | 7.2%    | 7.8%    | 8.3%    | 5.7%    | 6.4%    | 10.9%   | 53 |                  |
| <b>Total Personal Income (\$1000s) /b</b> |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 179,180            | 233,311 | 297,700 | 288,570 | 297,398 | 269,444 | 265,321 | 260,566 | 251,307 | 293,118 | 271,000 | 12 |                  |
| Fergus                                    | 95,922             | 123,916 | 166,661 | 160,298 | 161,694 | 145,682 | 145,224 | 140,808 | 135,592 | 150,017 | ...     | 15 |                  |
| Golden Valley                             | 7,673              | 9,015   | 10,969  | 10,650  | 12,038  | 11,147  | 10,156  | 11,236  | 11,114  | 16,341  | ...     | 56 |                  |
| Judith Basin                              | 26,751             | 29,671  | 28,145  | 27,161  | 27,272  | 24,199  | 25,267  | 26,471  | 24,636  | 29,677  | ...     | 47 |                  |
| Musselshell                               | 26,336             | 37,331  | 36,127  | 36,199  | 61,210  | 57,485  | 55,079  | 52,362  | 50,681  | 52,556  | ...     | 37 |                  |
| Petroleum                                 | 5,368              | 5,643   | 5,925   | 6,493   | 8,224   | 4,327   | 3,627   | 3,382   | 3,709   | 6,301   | ...     | 56 |                  |
| Wheatland                                 | 19,193             | 27,736  | 29,893  | 27,609  | 28,960  | 26,603  | 25,447  | 26,330  | 25,774  | 30,424  | ...     | 45 |                  |
| <b>Per Capita Personal Income /b</b>      |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 8,661              | 9,916   | 12,263  | 11,918  | 12,263  | 11,089  | 10,866  | 10,687  | 10,336  | 11,955  | 11,700  | 10 |                  |
| Fergus                                    | 8,901              | 9,708   | 12,798  | 12,276  | 12,479  | 11,219  | 11,311  | 10,973  | 10,333  | 11,955  | ...     | 27 |                  |
| Golden Valley                             | 6,396              | 9,400   | 10,949  | 10,443  | 11,126  | 10,350  | 9,456   | 10,150  | 9,671   | 13,097  | ...     | 38 |                  |
| Judith Basin                              | 7,986              | 10,942  | 10,506  | 10,169  | 9,902   | 9,098   | 9,477   | 9,771   | 9,177   | 11,555  | ...     | 67 |                  |
| Musselshell                               | 3,486              | 9,782   | 12,295  | 13,046  | 13,356  | 12,365  | 11,525  | 10,945  | 10,636  | 11,303  | ...     | 25 |                  |
| Petroleum                                 | 5,940              | 8,109   | 8,830   | 6,807   | 9,180   | 6,516   | 5,431   | 5,147   | 5,845   | 10,263  | ...     | 56 |                  |
| Wheatland                                 | 6,366              | 10,755  | 12,775  | 11,860  | 13,175  | 11,755  | 10,894  | 11,482  | 11,557  | 13,698  | ...     | 21 |                  |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 66,963             | 107,619 | 165,420 | 136,676 | 134,653 | 123,920 | 123,051 | 119,252 | 119,805 | 117,216 | 112,000 | 12 |                  |
| Fergus                                    | 50,453             | 61,231  | 89,674  | 84,627  | 80,036  | 75,109  | 76,653  | 71,249  | 71,953  | 70,749  | ...     | 20 |                  |
| Golden Valley                             | 2,305              | 2,113   | 2,436   | 2,567   | 2,957   | 2,536   | 2,653   | 3,377   | 3,573   | 3,976   | ...     | 55 |                  |
| Judith Basin                              | 6,545              | 7,374   | 9,662   | 8,845   | 8,695   | 8,653   | 8,379   | 8,500   | 8,444   | 8,592   | ...     | 49 |                  |
| Musselshell                               | 16,943             | 20,475  | 29,659  | 30,009  | 30,687  | 27,680  | 25,530  | 23,764  | 23,182  | 21,363  | ...     | 38 |                  |
| Petroleum                                 | 2,179              | 2,259   | 1,623   | 1,453   | 1,656   | 1,409   | 1,520   | 1,626   | 1,688   | 1,707   | ...     | 56 |                  |
| Wheatland                                 | 10,518             | 15,967  | 12,366  | 11,377  | 10,626  | 10,334  | 10,116  | 10,736  | 10,966  | 10,831  | ...     | 47 |                  |
| <b>Farm Earnings (\$1000s) /b</b>         |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 50,597             | 67,736  | 37,442  | 29,265  | 33,641  | 13,199  | 6,541   | 2,927   | (5,949) | 28,962  | 24,000  | 8  |                  |
| Fergus                                    | 22,864             | 30,277  | 19,326  | 14,704  | 15,716  | 5,325   | 1,846   | (1,138) | (6,178) | 8,830   | ...     | 20 |                  |
| Golden Valley                             | 3,829              | 4,203   | 2,057   | 2,095   | 2,816   | 1,599   | 612     | 690     | 366     | 3,325   | ...     | 47 |                  |
| Judith Basin                              | 13,241             | 15,360  | 5,049   | 4,307   | 3,754   | 1,156   | 1,841   | 1,755   | (886)   | 4,510   | ...     | 39 |                  |
| Musselshell                               | 3,652              | 7,105   | 1,985   | 2,378   | 3,270   | 1,366   | 695     | 402     | (199)   | 3,943   | ...     | 43 |                  |
| Petroleum                                 | 2,560              | 2,950   | 2,708   | 1,223   | 2,696   | 1,026   | 76      | (169)   | 188     | 2,732   | ...     | 50 |                  |
| Wheatland                                 | 4,451              | 7,683   | 6,317   | 4,559   | 5,386   | 2,731   | 1,869   | 1,586   | 761     | 5,625   | ...     | 30 |                  |
| <b>Property Income (\$1000s) /b</b>       |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 27,337             | 36,418  | 68,219  | 70,240  | 77,539  | 79,556  | 82,196  | 84,210  | 83,791  | 83,387  | 81,000  | 10 |                  |
| Fergus                                    | 15,186             | 20,904  | 37,838  | 39,151  | 43,194  | 43,907  | 44,986  | 44,052  | 45,056  | 44,803  | ...     | 11 |                  |
| Golden Valley                             | 1,043              | 1,623   | 3,561   | 3,346   | 5,431   | 3,682   | 3,824   | 4,170   | 3,988   | 3,961   | ...     | 56 |                  |
| Judith Basin                              | 3,000              | 4,270   | 7,152   | 7,265   | 7,896   | 7,864   | 8,802   | 9,420   | 9,868   | 9,821   | ...     | 61 |                  |
| Musselshell                               | 6,458              | 5,637   | 11,846  | 12,251  | 13,593  | 14,457  | 16,860  | 14,093  | 14,314  | 14,265  | ...     | 37 |                  |
| Petroleum                                 | 235                | 402     | 941     | 1,132   | 1,353   | 1,134   | 1,239   | 1,239   | 1,276   | 1,267   | ...     | 56 |                  |
| Wheatland                                 | 2,819              | 3,582   | 6,881   | 7,094   | 8,073   | 8,516   | 8,443   | 9,236   | 9,311   | 9,269   | ...     | 42 |                  |
| <b>Transfer Payments (\$1000s) /b</b>     |                    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                                    | 17,975             | 27,080  | 68,005  | 51,029  | 52,690  | 53,787  | 54,514  | 56,966  | 55,626  | 56,880  | 57,000  | 12 |                  |
| Fergus                                    | 9,436              | 14,862  | 26,227  | 27,987  | 28,791  | 29,040  | 29,338  | 29,844  | 30,202  | 31,111  | ...     | 15 |                  |
| Golden Valley                             | 718                | 1,061   | 1,397   | 1,707   | 1,803   | 1,929   | 2,050   | 2,165   | 2,191   | 2,232   | ...     | 56 |                  |
| Judith Basin                              | 1,650              | 2,542   | 4,280   | 6,679   | 4,920   | 5,043   | 4,996   | 5,017   | 5,277   | 5,285   | ...     | 45 |                  |
| Musselshell                               | 3,685              | 5,010   | 10,205  | 10,531  | 10,663  | 11,045  | 11,615  | 11,393  | 11,285  | 11,351  | ...     | 37 |                  |
| Petroleum                                 | 459                | 303     | 628     | 651     | 700     | 690     | 759     | 767     | 750     | 787     | ...     | 56 |                  |
| Wheatland                                 | 2,027              | 3,212   | 5,047   | 5,673   | 5,813   | 6,041   | 5,959   | 5,891   | 5,925   | 5,916   | ...     | 44 |                  |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 date) and Per Capita Income (1982-1986 average).

/e 1987 data consists of preliminary estimates.

Table 2.37 WAGE &amp; SALARY EMPLOYMENT IN THE LEWISTOWN REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986  | 1987  | CHANGE  | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|-------|-------|---------|-------------------|
| Total Wage and Salary Employment                    |               | 5,094 | 5,001 | (93)    | -1.8%             |
| Total Private                                       |               | 3,370 | 3,312 | (58)    | -1.7%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping | E 69          | E 78  | E 9   | E 13.0% | "0"               |
| Agricultural Production--Crops ***                  | 01            | "0"   | "0"   | "0"     | "0"               |
| Agricultural Production--Livestock ***              | 02            | 51    | 55    | 4       | 7.8%              |
| Agricultural Services                               | 07            | 18    | 23    | 5       | 27.8%             |
| Forestry                                            | 08            |       |       |         |                   |
| Fishing, Hunting, and Trapping                      | 09            |       |       |         |                   |
| Mining                                              |               | E 85  | E 114 | E 29    | E 34.1%           |
| Metal Mining                                        | 10            | 9     | 39    | 30      | 333.3%            |
| Coal Mining                                         | 12            | "0"   | "0"   | "0"     | "0"               |
| Oil and Gas Extraction                              | 13            | 69    | 68    | (1)     | -1.4%             |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 7     | 7     | 0       | 0.0%              |
| Construction                                        |               | 234   | 190   | (44)    | -18.0%            |
| General Building Contractors                        | 15            | 26    | 17    | (9)     | -34.6%            |
| Heavy Construction Contractors                      | 16            | 130   | 98    | (32)    | -24.6%            |
| Special Trade Contractors                           | 17            | 74    | 71    | (3)     | -4.1%             |
| Manufacturing                                       |               | 325   | 259   | (66)    | -20.3%            |
| Food and Kindred Products                           | 20            | 46    | 43    | (3)     | -6.5%             |
| Textile Mill Products                               | 22            |       |       |         |                   |
| Apparel and Other Textile Products                  | 23            |       |       |         |                   |
| Lumber and Wood Products                            | 24            | 124   | 123   | (1)     | -0.8%             |
| Furniture and Fixtures                              | 25            |       |       |         |                   |
| Paper and Allied Products                           | 26            |       |       |         |                   |
| Printing and Publishing                             | 27            | 43    | 39    | (4)     | -9.3%             |
| Chemicals and Allied Products                       | 28            | 8     | "0"   | "0"     | "0"               |
| Petroleum Refining and Related Industries           | 29            |       |       |         |                   |
| Rubber and Miscellaneous Plastic Products           | 30            |       |       |         |                   |
| Leather and Leather Products                        | 31            | "0"   | "0"   | "0"     | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | 83    | 36    | (47)    | -56.6%            |
| Primary Metals Processing                           | 33            |       |       |         |                   |
| Fabricated Metal Products                           | 34            |       |       |         |                   |
| Machinery, Except Electrical                        | 35            | "0"   | "0"   | "0"     | "0"               |
| Electrical and Electronic Equipment                 | 36            | "0"   | "0"   | "0"     | "0"               |
| Transportation Equipment                            | 37            |       |       |         |                   |
| Instruments and Related Products                    | 38            |       |       |         |                   |
| Miscellaneous Manufacturing Industries              | 39            | "0"   | "0"   | "0"     | "0"               |
| Transportation and Public Utilities                 |               | 198   | 195   | (3)     | -1.5%             |
| Local and Interurban Passenger Transit              | 41            |       |       |         |                   |
| Trucking and Warehousing                            | 42            | 70    | 72    | 2       | 2.9%              |
| Water Transportation                                | 44            |       |       |         |                   |
| Transportation by Air                               | 45            | "0"   | "0"   | "0"     | "0"               |
| Pipelines, Except Natural Gas                       | 46            |       |       |         |                   |
| Transportation Services                             | 47            | "0"   | "0"   | "0"     | "0"               |
| Communications                                      | 48            | 36    | 35    | (1)     | -2.8%             |
| Electric, Gas, and Sanitary Services                | 49            | 81    | 78    | (3)     | -3.7%             |
| Wholesale Trade                                     |               | 209   | 190   | (19)    | -9.1%             |
| Durable Goods                                       | 50            | 93    | 77    | (16)    | -17.2%            |
| Non-durable Goods                                   | 51            | 115   | 112   | (3)     | -2.6%             |
| Retail Trade                                        |               | 1,020 | 1,023 | 3       | 0.3%              |
| Building Materials and Hardware                     | 52            | 48    | 45    | (3)     | -6.3%             |
| General Merchandise Stores                          | 53            | 60    | 83    | 23      | 38.3%             |
| Food Stores                                         | 54            | 188   | 185   | (3)     | -1.6%             |
| Automotive Dealers and Service Stations             | 55            | 177   | 157   | (20)    | -11.3%            |
| Apparel and Accessory Stores                        | 56            | 58    | 52    | (6)     | -10.3%            |
| Furniture and Home Furnishings Stores               | 57            | 21    | 21    | 0       | 0.0%              |
| Eating and Drinking Places                          | 58            | 382   | 395   | 13      | 3.4%              |
| Miscellaneous Retail                                | 59            | 76    | 73    | (3)     | -3.9%             |
| Finance, Insurance, and Real Estate                 |               | 238   | 227   | (11)    | -4.6%             |
| Banking                                             | 60            | 149   | 131   | (18)    | -12.1%            |
| Credit Agencies other than Banks                    | 61            | 29    | 30    | 1       | 3.4%              |
| Security, Commodity Brokers, and Services           | 62            | "0"   | "0"   | "0"     | "0"               |
| Insurance Carriers                                  | 63            | "0"   | "0"   | "0"     | "0"               |
| Insurance Agents, Brokers, and Services             | 64            | 22    | 23    | 1       | 4.5%              |
| Real Estate                                         | 65            | 31    | 33    | 2       | 6.5%              |
| Combined Real Estate, Insurance, Etc.               | 66            | "0"   | "0"   | "0"     | "0"               |
| Holding and Other Investment Offices                | 67            |       |       |         |                   |
| Services                                            |               | 959   | 1,009 | 50      | 5.2%              |
| Hotels and Other Lodging Places                     | 70            | 128   | 129   | 1       | 0.8%              |
| Personal Services                                   | 72            | 40    | 38    | (2)     | -5.0%             |
| Business Services                                   | 73            | 31    | 32    | 1       | 3.2%              |
| Auto Repair, Services, and Garages                  | 75            | 16    | 15    | (1)     | -6.3%             |
| Miscellaneous Repair Services                       | 76            | 10    | 21    | 11      | 110.0%            |
| Motion Pictures                                     | 78            | "0"   | "0"   | "0"     | "0"               |
| Amusement and Recreation Services                   | 79            | 38    | 44    | 6       | 15.8%             |
| Private Health Services                             | 80            | 476   | 502   | 26      | 5.5%              |
| Legal Services                                      | 81            | 23    | 24    | 1       | 4.3%              |
| Private Educational Services                        | 82            | 18    | 11    | (7)     | -38.9%            |
| Private Social Services                             | 83            | 66    | 76    | 10      | 15.2%             |
| Museums, Art Galleries, Etc.                        | 84            | "0"   | "0"   | "0"     | "0"               |
| Membership Organizations Including Tribal Gov't     | 86            | 51    | 39    | (12)    | -23.5%            |
| Private Households                                  | 88            | 9     | 13    | 4       | 44.4%             |
| Engineering, Accounting, and Other Services         | 89            | 22    | 45    | 23      | 104.5%            |
| Non-Classifiable                                    | 99            |       |       |         |                   |
| Government                                          |               | 1,722 | 1,688 | (34)    | -2.0%             |
| State                                               |               | 268   | 262   | (6)     | -2.2%             |
| Local                                               |               | 1,179 | 1,140 | (39)    | -3.3%             |
| Federal                                             |               | 271   | 279   | 8       | 3.0%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.52

## UNEMPLOYMENT RATE -- LEWISTOWN REGION

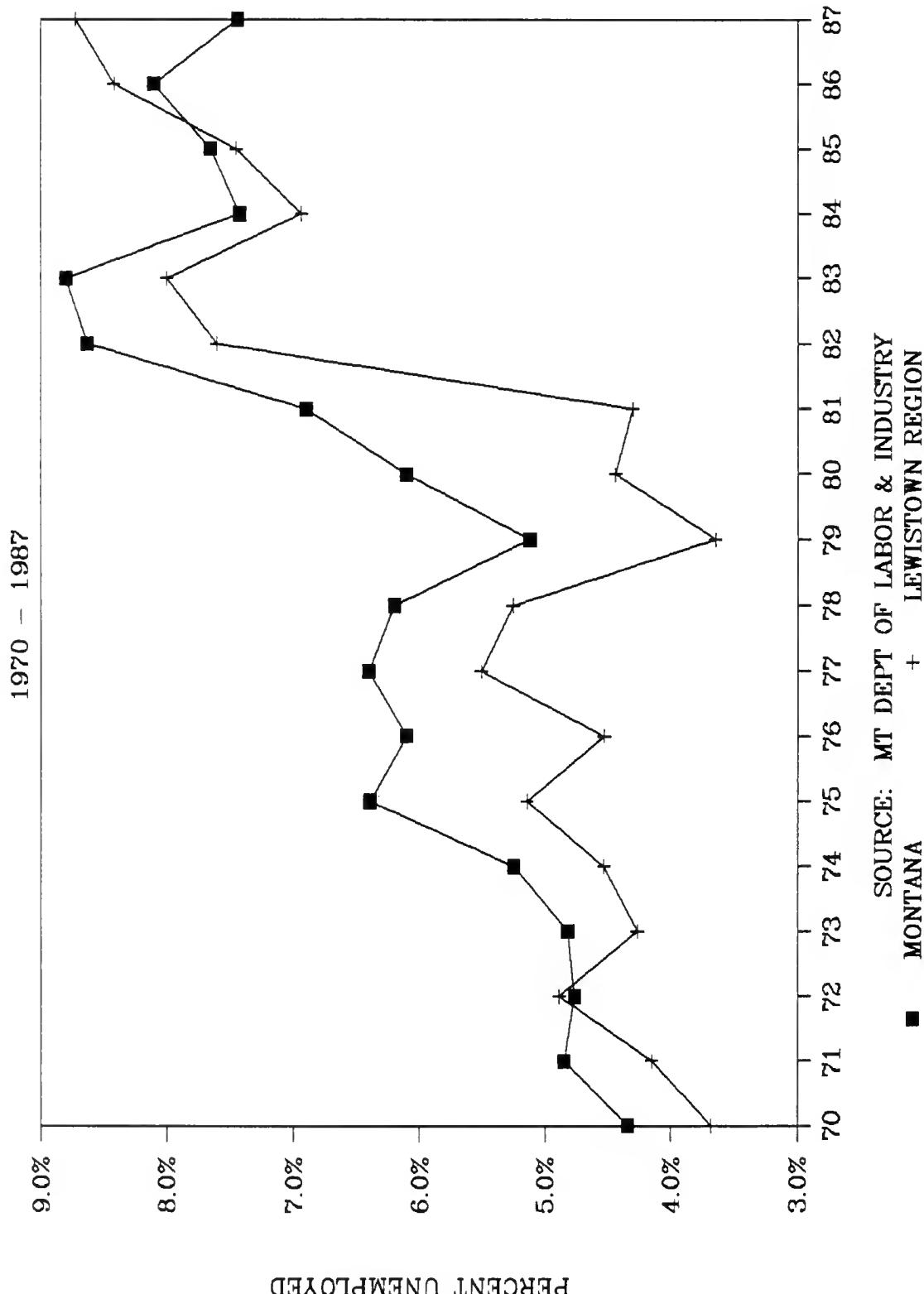
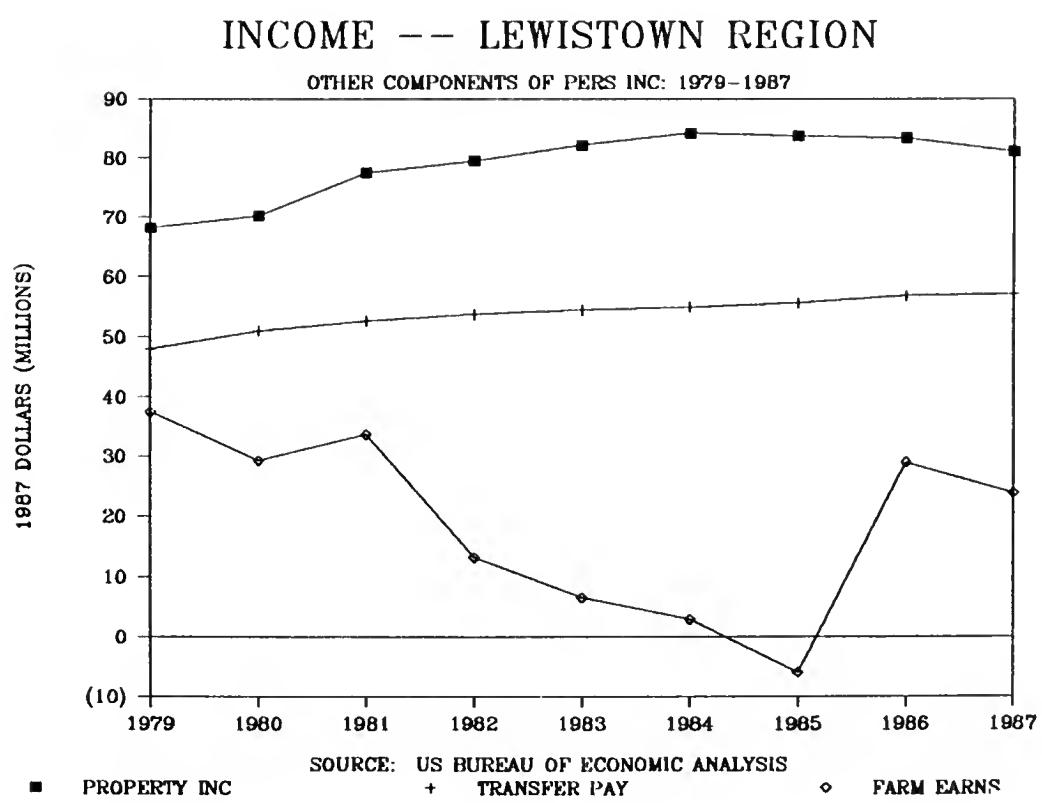
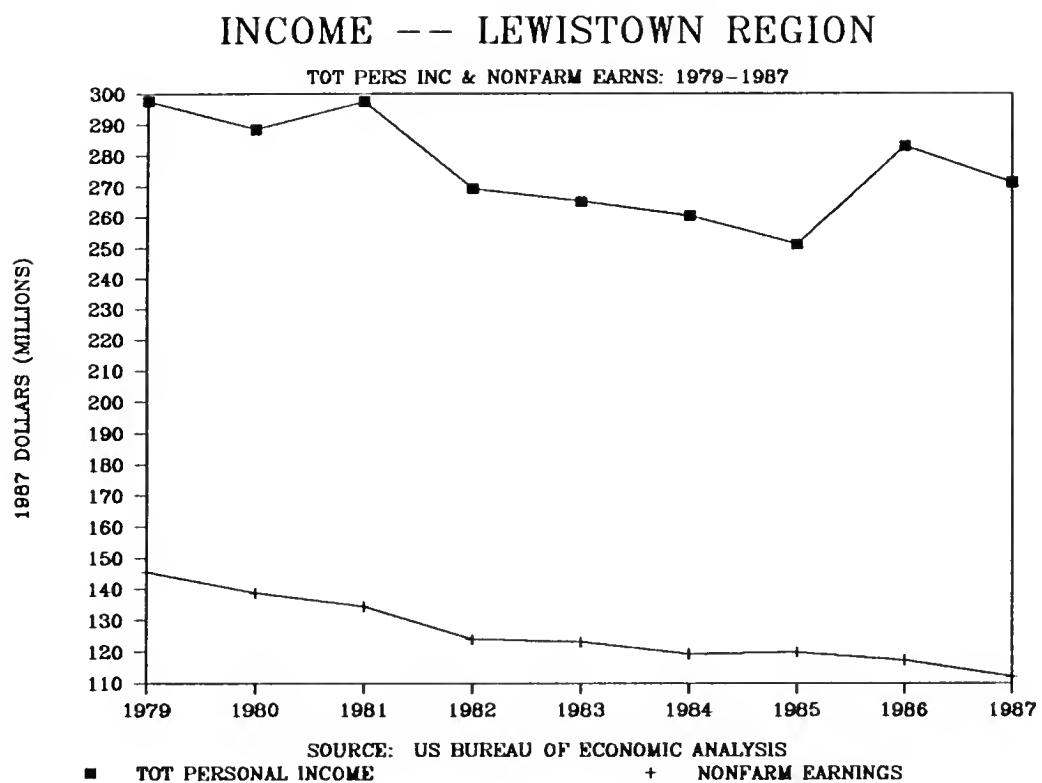


Figure 2.53



## The Miles City Region

Located in southeastern Montana, the Miles City Region includes Carter, Custer, Fallon, Powder River, Rosebud, and Treasure counties.

### Labor Force

Nearly 17,000 jobs in 1986 ranked the Miles City Region eighth in the state for total jobs (Table 2.38). Approximately three-quarters of these jobs were located in Custer County or Rosebud County, with the other four counties each contributing smaller portions. This region accounted for 4.1 percent of total jobs in Montana in 1986, slightly less than the 4.4 percent figure in 1969 (Figure 2.3).

Between 1969 and 1986, jobs growth depended heavily on the construction industry. Peaks in total and wage/salary jobs occurred in 1975 during a statewide economic slowdown and again in 1982, when total jobs statewide were at a low point (Figures 2.54 and 2.9). These peaks reflect the construction cycles for the four Colstrip electrical generating units in Rosebud County. After 1982, jobs declined steadily as construction activity decreased through 1987.

Historically, the Miles City Region has been primarily an agricultural region. In 1969, agriculture accounted for 27 percent of total jobs in the region. The general statewide decline in agriculture, accompanied by the Colstrip electrical plants and the ensuing coal mining, however, decreased agriculture's share in total jobs to 16 percent in 1986, although still much greater than the statewide average of 9 percent. Other important sectors include services, government, and retail trade.

Heavy construction contractors experienced large increases in employment in the mid-1970s, and coal mining grew over the decade by nearly 1,000 percent, or about 350 jobs. About 200 workers were added in 1975 and 1976 to operate the generating plants. State and local government contributed another 700 jobs over the decade. Other service-producing sectors increased, with private educational and health services, eating/drinking places, wholesale trade, and membership organizations (mainly Northern Cheyenne tribal organizations) all growing substantially. Agriculture was the only sector to decline. Manufacturing was relatively stable with increases in several components including lumber/wood products being counterbalanced by the closure of an establishment producing plastic novelty items.

Between 1979 and 1982, the region again experienced remarkable growth as construction on Colstrip electrical generating units resumed. Wage/salary jobs in the construction sector alone increased by about 2,000. Oil/gas extraction, eating/drinking places, and private business and health services also experienced strong growth. Once again, agriculture declined in employment as did manufacturing (lumber/wood products).

The decline in wage/salary jobs after 1982 was felt throughout the economy as the boom of the preceding years came to an end. Between 1982 and 1986,

construction declined by about the same amount it increased over the 1979-1982 period; oil/gas mining declined more (300 job decline versus a 200 job increase). Construction and oil/gas extraction represented fewer wage/salary jobs in 1986 than in 1969. The service-oriented sectors suffered as well with retail trade (mainly eating/drinking places), various private services, and wholesale trade all experiencing large declines. Growing industries included local government, utilities (the Colstrip electrical plants), and the military (establishment of a small Air Force facility). Decline in agricultural employment slowed. The general continuation of these trends between 1986 and 1987 is shown in Table 2.39.

The large declines in employment after the Colstrip construction should be viewed in context. The construction provided a superficial boost to the economy while it existed. Between 1969 (before construction began) and 1986, total jobs experienced net growth of about 32 percent--the sixth highest percentage growth in the state. Furthermore, the decline in wage/salary jobs shown in Table 2.39 for 1986-1987 overstates the magnitude of the decline that actually occurred in 1987 because better performance in 1987 is "averaged out" by the yearly figures. Comparing the fourth quarter of 1986 with the fourth quarter of 1987 shows that wage/salary jobs declined by only 1.4 percent, or by about 140 jobs.

Historically, the unemployment rate of the Miles City Region was well under the statewide average. This was true in 1987, when the region's unemployment rate of 6.8 percent was the state's third. According to Figure 2.56, the only year that the region's unemployment rate was above the statewide average was 1984, primarily because of high unemployment in Rosebud County associated with the near completion of the Colstrip construction.

### Population

With a population of over 33,000 in 1987, the Miles City Region was the eighth largest region. As in other primarily agricultural regions, population growth was very strong prior to 1920. After 1920, however, population declined and stagnated, with growth returning only in recent years (Table 2.8).

Beginning in 1973, substantial population growth characterized this region. As Figure 2.55 illustrates, the population pattern closely followed growth in total jobs, with a lag time of between one and two years. Total jobs peaked first in 1975, and population followed two years later. The low point for total jobs in 1977 was followed again by population the next year, then peaked a second time in 1982. Declining population since 1983 has paralleled the decline in jobs.

### Income

Income rankings for the Miles City Region in 1986 varied considerably. Total personal income and transfer payments both ranked ninth, while nonfarm earnings ranked eighth. Property income ranked low at 11th, while farm earnings were relatively high at sixth, reflecting the importance of agriculture to this region.

Changes in farm and nonfarm earnings influenced total personal income (Figure 2.57). Between 1979 and 1982, nonfarm worker earnings rose substantially with wage/salary jobs created by the Colstrip construction. At the same time, however, farm earnings declined dramatically from a peak in 1979. The net result was moderate growth in total income, supported by increases in property income and transfer payments.

After peaking in 1982, nonfarm earnings declined steadily through 1987, again following the trend of wage/salary jobs. During the first part of this period, however, farm earnings were extremely low, partially the result of drought conditions. Thus, the decline in nonfarm earnings translated into a decline in total income. The partial recovery in the agricultural sector in 1986 provided a temporary boost to total personal income, but farm earnings remained unchanged in 1987 and total personal income continued to decline.

Regional per capita income in the Miles City Region ranked fourth in the state for the 1982-1986 period, however, partially because of the strong performance of nonfarm earnings in 1982 and the strong performance of farm earnings in 1986. The trend for per capita income generally was downward for the 1979-1987 period, reflecting population increases and the end of Colstrip construction (Table 2.38). Between 1984 and 1987, regional per capita income was below the statewide average.

Figure 2.54

### EMPLOYMENT--MILES CITY REGION

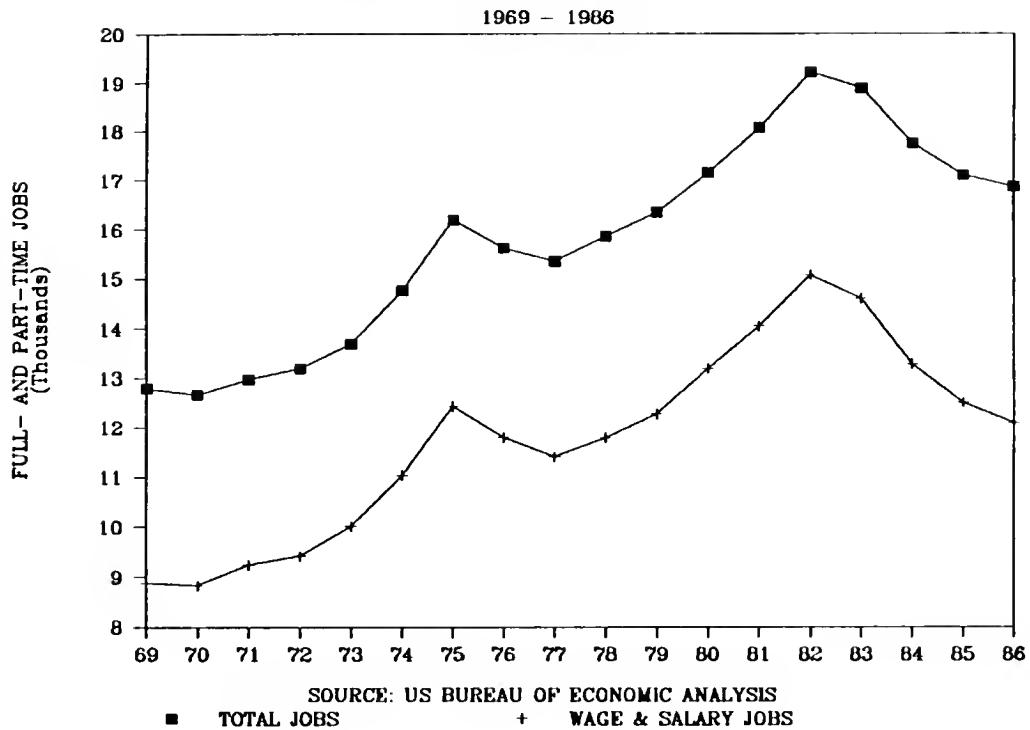


Figure 2.55

### POPULATION--MILES CITY REGION

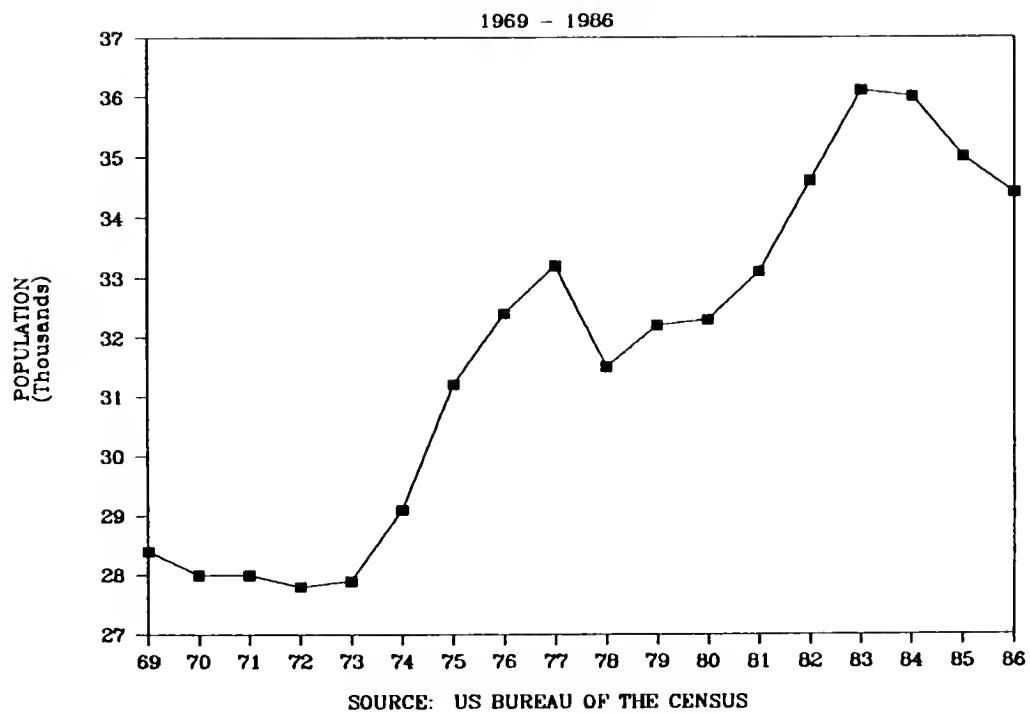


Table 2.38

|                                    | The Miles City Region |         |         |         |         |         |         |         |         |         |         |    |                  |
|------------------------------------|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----|------------------|
|                                    | 1959                  | 1969    | 1979    | 1980    | 1981    | 1982    | 1983    | 1984    | 1985    | 1986    | 1987    | /p | Rank in State /d |
|                                    | (Region or County)    |         |         |         |         |         |         |         |         |         |         |    |                  |
| Population /a                      |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 29,500                | 28,400  | 32,200  | 32,300  | 33,100  | 34,800  | 36,100  | 36,000  | 35,000  | 36,400  | 33,400  | 8  |                  |
| Carter                             | 2,500                 | 2,000   | 1,800   | 1,800   | 1,700   | 1,700   | 1,800   | 1,700   | 1,800   | 1,700   | 1,700   | 50 |                  |
| Custer                             | 13,100                | 12,300  | 13,200  | 13,100  | 13,200  | 13,400  | 13,500  | 13,500  | 13,400  | 13,100  | 12,700  | 12 |                  |
| Fallon                             | 4,000                 | 4,100   | 3,900   | 3,800   | 3,700   | 3,800   | 3,800   | 3,800   | 3,800   | 3,800   | 3,500   | 39 |                  |
| Powder River                       | 2,500                 | 2,800   | 2,500   | 2,500   | 2,500   | 2,500   | 2,500   | 2,500   | 2,400   | 2,400   | 2,300   | 46 |                  |
| Rosebud                            | 4,100                 | 4,100   | 9,700   | 10,100  | 11,000  | 12,200  | 13,500  | 13,500  | 12,600  | 12,600  | 12,300  | 15 |                  |
| Treasure                           | 1,300                 | 1,100   | 1,100   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 55 |                  |
| Total Jobs /b                      |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | ...                   | 12,796  | 18,339  | 17,162  | 18,075  | 19,212  | 18,390  | 17,756  | 17,097  | 18,858  | ...     | 8  |                  |
| Carter                             | ...                   | 1,034   | 967     | 943     | 971     | 973     | 957     | 948     | 935     | 956     | ...     | 50 |                  |
| Custer                             | ...                   | 5,481   | 4,933   | 7,060   | 8,748   | 6,587   | 6,710   | 8,860   | 4,788   | 6,759   | ...     | 12 |                  |
| Fallon                             | ...                   | 1,774   | 2,116   | 2,193   | 2,123   | 2,083   | 1,978   | 1,977   | 1,911   | 1,843   | ...     | 38 |                  |
| Powder River                       | ...                   | 1,405   | 1,399   | 1,399   | 1,418   | 1,463   | 1,437   | 1,365   | 1,378   | 1,375   | ...     | 43 |                  |
| Rosebud                            | ...                   | 2,583   | 4,455   | 5,100   | 4,356   | 7,669   | 7,353   | 6,140   | 5,630   | 5,649   | ...     | 17 |                  |
| Treasure                           | ...                   | 519     | 469     | 479     | 461     | 457     | 457     | 466     | 455     | 476     | ...     | 55 |                  |
| Wage & Salary Jobs /b              |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | ...                   | 8,877   | 12,268  | 13,109  | 14,058  | 15,067  | 14,590  | 15,278  | 12,495  | 12,078  | ...     | 8  |                  |
| Carter                             | ...                   | 434     | 463     | 475     | 495     | 495     | 462     | 451     | 437     | 451     | ...     | 52 |                  |
| Custer                             | ...                   | 4,370   | 5,476   | 5,662   | 5,329   | 5,157   | 5,208   | 5,228   | 3,091   | 4,973   | ...     | 12 |                  |
| Fallon                             | ...                   | 1,164   | 1,523   | 1,594   | 1,550   | 1,482   | 1,380   | 1,378   | 1,303   | 1,220   | ...     | 37 |                  |
| Powder River                       | ...                   | 764     | 842     | 840     | 855     | 872     | 813     | 717     | 716     | 689     | ...     | 46 |                  |
| Rosebud                            | ...                   | 1,850   | 3,670   | 4,327   | 5,534   | 6,814   | 8,465   | 3,231   | 4,688   | 4,467   | ...     | 15 |                  |
| Treasure                           | ...                   | 295     | 294     | 291     | 276     | 287     | 266     | 273     | 260     | 278     | ...     | 54 |                  |
| Unemployment Rate /c               |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | ...                   | 2.9%    | 3.9%    | 4.2%    | 4.8%    | 5.6%    | 7.3%    | 7.7%    | 7.2%    | 7.7%    | 6.8%    | 3  |                  |
| Carter                             | ...                   | 3.3%    | 7.8%    | 4.0%    | 1.8%    | 5.5%    | 9.6%    | 3.3%    | 2.4%    | 3.7%    | 3.6%    | 3  |                  |
| Custer                             | ...                   | 3.2%    | 3.48    | 3.8%    | 4.9%    | 6.2%    | 8.2%    | 5.3%    | 5.5%    | 6.3%    | 5.6%    | 16 |                  |
| Fallon                             | ...                   | 2.8%    | 2.1%    | 2.1%    | 2.2%    | 3.9%    | 5.8%    | 4.7%    | 8.0%    | 10.6%   | 7.2%    | 29 |                  |
| Powder River                       | ...                   | 1.4%    | 2.8%    | 2.8%    | 2.1%    | 3.2%    | 4.2%    | 4.2%    | 2.4%    | 4.6%    | 4.3%    | 4  |                  |
| Rosebud                            | ...                   | 3.1%    | 9.0%    | 5.7%    | 7.0%    | 8.4%    | 9.2%    | 12.7%   | 11.4%   | 10.4%   | 9.6%    | 47 |                  |
| Treasure                           | ...                   | 3.2%    | 3.2%    | 3.9%    | 2.7%    | 5.2%    | 7.3%    | 8.9%    | 8.1%    | 4.7%    | 5.0%    | 10 |                  |
| Total Personal Income (\$1000s) /b |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 189,942               | 283,267 | 416,337 | 628,494 | 438,470 | 443,453 | 432,802 | 414,417 | 395,594 | 408,117 | 395,000 | 9  |                  |
| Carter                             | 12,634                | 23,460  | 25,732  | 20,907  | 18,462  | 15,287  | 15,120  | 15,621  | 14,549  | 20,709  | ...     | 51 |                  |
| Custer                             | 94,590                | 128,309 | 181,145 | 185,511 | 173,808 | 164,826 | 170,638 | 174,986 | 173,725 | 171,253 | ...     | 12 |                  |
| Fallon                             | 22,054                | 37,007  | 54,441  | 59,366  | 54,827  | 53,020  | 48,274  | 49,179  | 54,017  | 43,971  | ...     | 38 |                  |
| Powder River                       | 17,311                | 29,184  | 38,518  | 33,550  | 33,970  | 30,514  | 27,865  | 26,448  | 24,808  | 29,920  | ...     | 44 |                  |
| Rosebud                            | 34,714                | 51,013  | 103,594 | 111,022 | 141,853 | 165,641 | 160,418 | 137,010 | 126,584 | 128,192 | ...     | 18 |                  |
| Treasure                           | 8,335                 | 14,092  | 14,907  | 15,858  | 15,750  | 12,365  | 12,687  | 11,173  | 11,911  | 14,071  | ...     | 55 |                  |
| Per Capita Personal Income /b      |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 6,439                 | 9,993   | 12,932  | 13,203  | 13,226  | 12,857  | 11,981  | 11,685  | 11,328  | 11,869  | 11,800  | 4  |                  |
| Carter                             | 5,174                 | 11,694  | 13,073  | 11,731  | 10,579  | 7,757   | 7,467   | 8,973   | 8,266   | 12,026  | ...     | 55 |                  |
| Custer                             | 7,221                 | 10,452  | 13,753  | 14,119  | 13,136  | 12,436  | 12,642  | 12,923  | 12,984  | 13,076  | ...     | 7  |                  |
| Fallon                             | 5,514                 | 9,132   | 14,069  | 15,839  | 15,178  | 13,971  | 12,641  | 13,111  | 12,219  | 12,706  | ...     | 4  |                  |
| Powder River                       | 4,924                 | 10,297  | 15,141  | 13,354  | 13,725  | 12,268  | 11,168  | 10,639  | 10,147  | 12,514  | ...     | 26 |                  |
| Rosebud                            | 5,699                 | 8,415   | 10,657  | 10,974  | 12,932  | 13,594  | 11,863  | 10,133  | 9,913   | 10,046  | ...     | 29 |                  |
| Treasure                           | 8,412                 | 12,836  | 13,816  | 16,083  | 13,705  | 12,110  | 12,078  | 10,702  | 11,864  | 14,100  | ...     | 15 |                  |
| Nonfarm Earnings (\$1000s) /b      |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 114,624               | 155,913 | 260,622 | 280,451 | 309,792 | 358,120 | 342,282 | 293,387 | 269,854 | 256,320 | 247,000 | 8  |                  |
| Carter                             | 4,262                 | 5,456   | 6,560   | 8,309   | 6,022   | 6,005   | 5,949   | 6,020   | 5,663   | 5,502   | ...     | 52 |                  |
| Custer                             | 68,048                | 83,988  | 115,235 | 115,033 | 101,585 | 97,808  | 99,844  | 102,113 | 100,392 | 96,264  | ...     | 13 |                  |
| Fallon                             | 15,372                | 22,661  | 38,410  | 62,129  | 38,051  | 36,415  | 32,122  | 32,412  | 30,564  | 27,750  | ...     | 34 |                  |
| Powder River                       | 5,783                 | 10,732  | 15,532  | 18,428  | 16,059  | 17,599  | 15,164  | 13,417  | 13,314  | 12,418  | ...     | 43 |                  |
| Rosebud                            | 18,310                | 29,158  | 80,088  | 87,427  | 144,023 | 196,261 | 185,204 | 135,182 | 115,860 | 110,196 | ...     | 10 |                  |
| Treasure                           | 2,849                 | 3,514   | 4,396   | 4,133   | 4,052   | 4,014   | 3,879   | 4,043   | 4,060   | 4,209   | ...     | 54 |                  |
| Farm Earnings (\$1000s) /b         |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 40,967                | 75,180  | 59,764  | 48,963  | 38,388  | 12,641  | 10,070  | 14,894  | 14,623  | 35,258  | 35,000  | 6  |                  |
| Carter                             | 4,423                 | 13,349  | 9,945   | 7,105   | 4,338   | (940)   | (1,620) | 140     | (842)   | 5,417   | ...     | 32 |                  |
| Custer                             | 7,681                 | 17,199  | 11,409  | 12,935  | 9,707   | 5,259   | 5,129   | 8,043   | 9,906   | 10,896  | ...     | 13 |                  |
| Fallon                             | 3,451                 | 9,758   | 4,723   | 5,441   | 5,093   | 2,370   | 1,607   | 2,198   | 1,170   | 3,575   | ...     | 46 |                  |
| Powder River                       | 4,123                 | 13,763  | 13,261  | 7,665   | 7,410   | 2,138   | 1,731   | 1,820   | 861     | 8,693   | ...     | 28 |                  |
| Rosebud                            | 10,010                | 12,696  | 15,093  | 9,570   | 8,236   | 2,072   | 1,343   | 1,426   | 1,663   | 4,515   | ...     | 38 |                  |
| Treasure                           | 3,870                 | 8,415   | 5,332   | 4,029   | 3,403   | 1,742   | 1,879   | 1,267   | 1,864   | 4,740   | ...     | 41 |                  |
| Property Income (\$1000s) /b       |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 23,438                | 35,710  | 68,103  | 71,438  | 79,206  | 83,189  | 80,452  | 80,771  | 78,785  | 78,600  | 75,000  | 11 |                  |
| Carter                             | 1,117                 | 2,542   | 4,879   | 5,062   | 5,305   | 5,499   | 5,853   | 4,665   | 6,817   | 8,745   | ...     | 47 |                  |
| Custer                             | 13,247                | 18,674  | 34,791  | 35,706  | 38,995  | 41,046  | 39,611  | 38,621  | 37,120  | 36,958  | ...     | 13 |                  |
| Fallon                             | 2,009                 | 3,847   | 4,921   | 7,795   | 9,105   | 9,380   | 9,348   | 9,287   | 9,201   | 9,183   | ...     | 43 |                  |
| Powder River                       | 1,620                 | 3,081   | 8,181   | 8,436   | 8,778   | 8,915   | 8,842   | 8,643   | 8,583   | 8,597   | ...     | 68 |                  |
| Rosebud                            | 4,199                 | 4,214   | 12,228  | 15,341  | 15,457  | 16,732  | 15,164  | 16,090  | 15,472  | 15,783  | ...     | 35 |                  |
| Treasure                           | 995                   | 1,352   | 3,102   | 3,137   | 3,368   | 3,597   | 3,615   | 3,285   | 3,384   | 3,356   | ...     | 55 |                  |
| Transfer Payments (\$1000s) /b     |                       |         |         |         |         |         |         |         |         |         |         |    |                  |
| Region                             | 16,049                | 27,173  | 47,864  | 51,090  | 53,562  | 54,046  | 60,181  | 62,295  | 62,898  | 64,655  | 85,000  | 9  |                  |
| Carter                             | 1,206                 | 1,880   | 2,360   | 2,712   | 2,866   | 2,922   | 3,145   | 3,022   | 3,168   | 3,268   | ...     | 53 |                  |
| Custer                             | 7,710                 | 13,448  | 23,454  | 24,881  | 25,902  | 26,810  | 28,443  | 29,469  | 30,342  | 31,452  | ...     | 14 |                  |
| Fallon                             | 1,765                 | 2,950   | 5,541   | 5,738   | 5,890   | 4,029   | 4,158   | 4,123   | 4,243   | 4,378   | ...     | 42 |                  |
| Powder River                       | 495                   | 1,667   | 2,897   | 2,945   | 3,084   | 3,272   | 3,560   | 3,707   | 3,720   | 3,882   | ...     | 50 |                  |
| Rosebud                            | 3,837                 | 8,447   | 12,074  | 13,302  | 14,249  | 15,414  | 16,910  | 18,208  | 17,568  | 17,811  | ...     | 29 |                  |
| Treasure                           | 636                   | 781     | 1,339   | 1,492   | 1,350   | 1,599   | 1,725   | 1,785   | 1,857   | 1,842   | ...     | 55 |                  |

/a U.S. Bureau of the Census   /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.39 WAGE &amp; SALARY EMPLOYMENT IN THE MILES CITY REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986    | 1987    | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|---------|---------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 10,065  | 9,678   | (387)  | -3.8%             |
| Total Private                                       |               | 7,178   | 6,805   | (373)  | -5.2%             |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 81      | 89      | 8      | 9.9%              |
| Agricultural Production-Crops ***                   | 01            | 8       | 5       | (3)    | -37.5%            |
| Agricultural Production-Livestock ***               | 02            | 53      | 60      | 7      | 13.2%             |
| Agricultural Services                               | 07            | 17      | 21      | 4      | 23.5%             |
| Forestry                                            | 08            |         |         |        |                   |
| Fishing, Hunting, and Trapping                      | 09            |         |         |        |                   |
| Mining                                              |               | 692     | 538     | (154)  | -22.3%            |
| Metal Mining                                        | 10            |         |         |        |                   |
| Coal Mining                                         | 12            | "0"     | "0"     | "0"    | "0"               |
| Oil and Gas Extraction                              | 13            | 181     | 112     | (69)   | -38.1%            |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | "0"     | "0"     | "0"    | "0"               |
| Construction                                        |               | 284     | 266     | (18)   | -6.3%             |
| General Building Contractors                        | 15            | 61      | 59      | (2)    | 13.1%             |
| Heavy Construction Contractors                      | 16            | 122     | 116     | (6)    | -4.9%             |
| Special Trade Contractors                           | 17            | 96      | 77      | (19)   | -19.8%            |
| Manufacturing                                       |               | 211     | 241     | 30     | 14.2%             |
| Food and Kindred Products                           | 20            | 47      | 43      | (4)    | -8.5%             |
| Textile Mill Products                               | 22            |         |         |        |                   |
| Apparel and Other Textile Products                  | 23            |         |         |        |                   |
| Lumber and Wood Products                            | 24            | 18      | 34      | 16     | 88.9%             |
| Furniture and Fixtures                              | 25            |         |         |        |                   |
| Paper and Allied Products                           | 26            |         |         |        |                   |
| Printing and Publishing                             | 27            | 95      | 88      | (7)    | -7.4%             |
| Chemicals and Allied Products                       | 28            |         |         |        |                   |
| Petroleum Refining and Related Industries           | 29            | "0"     | "0"     | "0"    | "0"               |
| Rubber and Miscellaneous Plastic Products           | 30            | "0"     | "0"     | "0"    | "0"               |
| Leather and Leather Products                        | 31            |         |         |        |                   |
| Stone, Clay, Glass, and Concrete Products           | 32            | 22      | 22      | 0      | 0.0%              |
| Primary Metals Processing                           | 33            |         |         |        |                   |
| Fabricated Metal Products                           | 34            | "0"     | "0"     | "0"    | "0"               |
| Machinery, Except Electrical                        | 35            |         |         |        |                   |
| Electrical and Electronic Equipment                 | 36            |         |         |        |                   |
| Transportation Equipment                            | 37            |         |         |        |                   |
| Instruments and Related Products                    | 38            |         |         |        |                   |
| Miscellaneous Manufacturing Industries              | 39            |         |         |        |                   |
| Transportation and Public Utilities                 |               | 1,335   | 1,252   | (83)   | -6.2%             |
| Local and Interurban Passenger Transit              | 41            | 41      | 42      | 1      | 2.4%              |
| Trucking and Warehousing                            | 42            | 259     | 200     | (59)   | -22.8%            |
| Water Transportation                                | 44            |         |         |        |                   |
| Transportation by Air                               | 45            | 7       | 7       | 0      | 0.0%              |
| Pipelines, Except Natural Gas                       | 46            | "0"     | "0"     | "0"    | "0"               |
| Transportation Services                             | 47            | "0"     | "0"     | "0"    | "0"               |
| Communications                                      | 48            | 104     | 91      | (13)   | -12.5%            |
| Electric, Gas, and Sanitary Services                | 49            | 897     | 884     | (13)   | -1.4%             |
| Wholesale Trade                                     |               | 360     | 375     | 7      | 1.9%              |
| Durable Goods                                       | 50            | 134     | 130     | (4)    | -3.0%             |
| Non-durable Goods                                   | 51            | 232     | 243     | 11     | 4.7%              |
| Retail Trade                                        |               | 1,695   | 1,626   | (69)   | -4.1%             |
| Building Materials and Hardware                     | 52            | 91      | 82      | (9)    | -9.9%             |
| General Merchandise Stores                          | 53            | 187     | 185     | (2)    | -1.1%             |
| Food Stores                                         | 54            | 273     | 260     | (13)   | -4.8%             |
| Automotive Dealers and Service Stations             | 55            | 224     | 204     | (20)   | -8.9%             |
| Apparel and Accessory Stores                        | 56            | 63      | 58      | (5)    | -7.9%             |
| Furniture and Home Furnishings Stores               | 57            | 28      | 23      | (5)    | -17.9%            |
| Eating and Drinking Places                          | 58            | 656     | 685     | (11)   | -4.6%             |
| Miscellaneous Retail                                | 59            | 120     | 116     | (2)    | -3.3%             |
| Finance, Insurance, and Real Estate                 |               | 423     | 404     | (19)   | -4.5%             |
| Banking                                             | 60            | 228     | 216     | (12)   | -5.3%             |
| Credit Agencies other than Banks                    | 61            | 27      | 28      | 1      | 3.7%              |
| Security, Commodity Brokers, and Services           | 62            |         |         |        |                   |
| Insurance Carriers                                  | 63            |         |         |        |                   |
| Insurance Agents, Brokers, and Services             | 64            | 65      | 70      | 5      | 7.7%              |
| Real Estate                                         | 65            | 180     | 83      | (17)   | -17.0%            |
| Combined Real Estate, Insurance, Etc.               | 66            | "0"     | "0"     | "0"    | "0"               |
| Holding and Other Investment Offices                | 67            | "0"     | "0"     | "0"    | "0"               |
| Services                                            |               | E 2,045 | E 1,971 | E (74) | E -3.6%           |
| Hotels and Other Lodging Places                     | 70            | 168     | 148     | (20)   | -11.9%            |
| Personal Services                                   | 72            | 69      | 74      | 5      | 7.2%              |
| Business Services                                   | 73            | 101     | 113     | 12     | 11.9%             |
| Auto Repair, Services, and Garage                   | 75            | 67      | 65      | (2)    | -3.0%             |
| Miscellaneous Repair Services                       | 76            | 17      | 16      | (1)    | -5.9%             |
| Motion Pictures                                     | 78            | 24      | 20      | (4)    | -16.7%            |
| Amusement and Recreation Services                   | 79            | 93      | 94      | 1      | 1.1%              |
| Private Health Services                             | 80            | 689     | 686     | (3)    | -0.4%             |
| Legal Services                                      | 81            | 36      | 39      | 3      | 8.3%              |
| Private Educational Services                        | 82            | 348     | 319     | (29)   | -8.3%             |
| Private Social Services                             | 83            | 82      | 79      | (3)    | -3.7%             |
| Museums, Art Galleries, Etc.                        | 84            | "0"     | "0"     | "0"    | "0"               |
| Membership Organizations Including Tribal Gov't     | 86            | 301     | 268     | (33)   | -11.0%            |
| Private Households                                  | 88            | 3       | 3       | 0      | 0.0%              |
| Engineering, Accounting, and Other Services         | 89            | 47      | 47      | 0      | 0.0%              |
| Non-Classifiable                                    | 99            | "0"     | "0"     | "0"    | "0"               |
| Government                                          |               | 2,884   | 2,870   | (14)   | -0.5%             |
| State                                               |               | 354     | 352     | (2)    | -0.6%             |
| Local                                               |               | 1,930   | 1,876   | (54)   | -2.8%             |
| Federal                                             |               | 595     | 638     | 43     | 7.2%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

"0" indicates employment is suppressed to protect individual firm confidentiality.

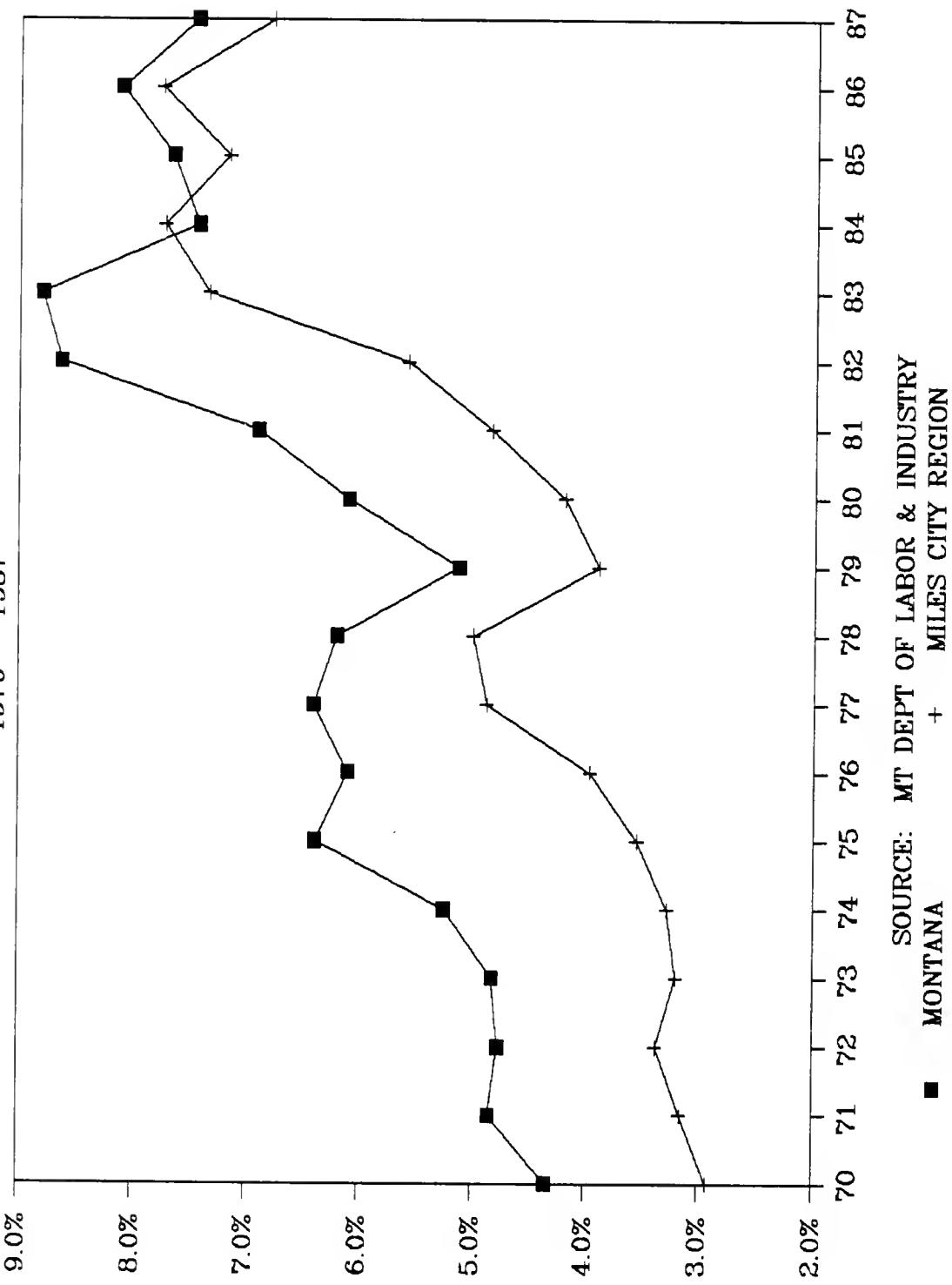
E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.56

## UNEMPLOYMENT RATE -- MILES CITY REGION

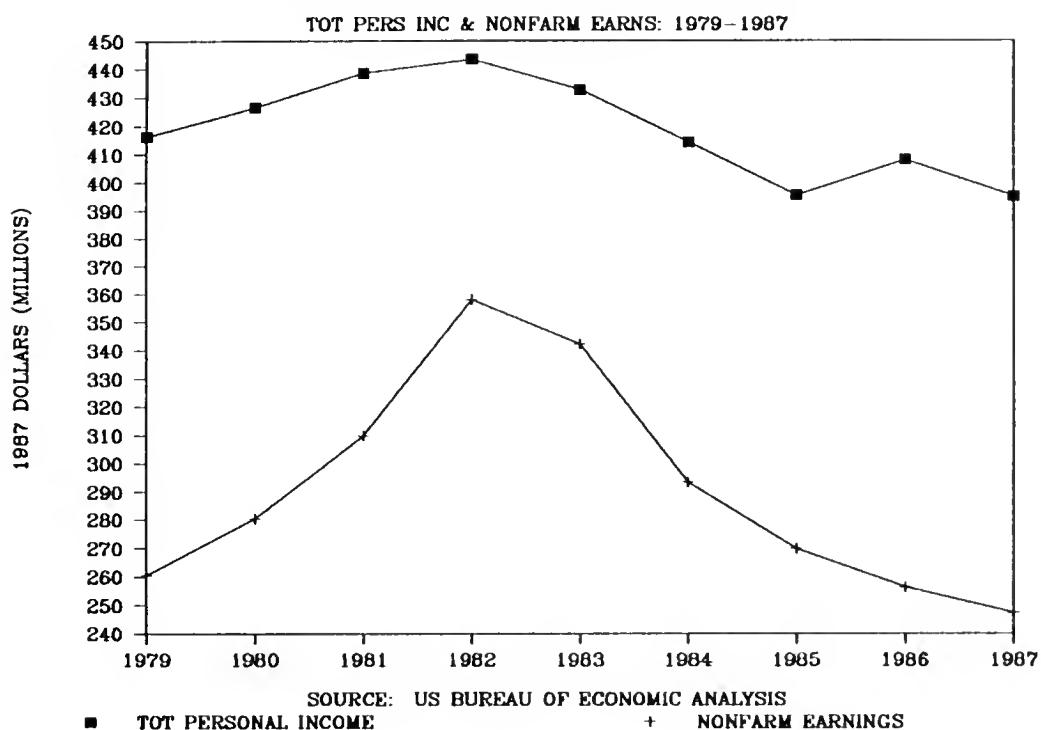
1970 - 1987



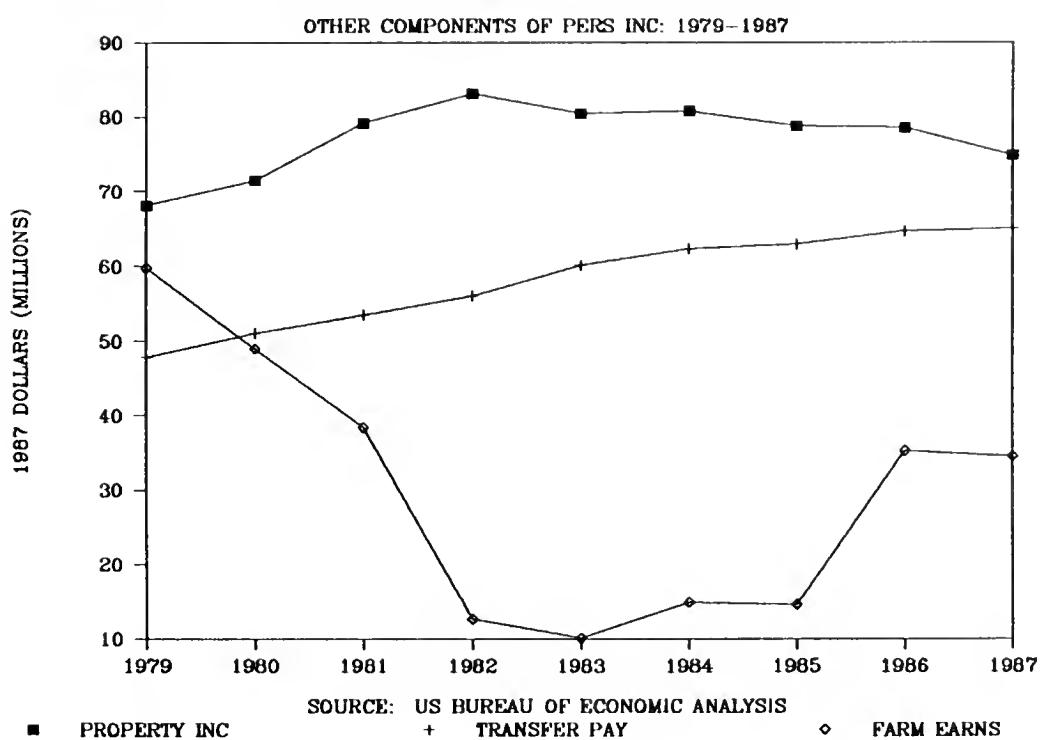
SOURCE: MT DEPT OF LABOR & INDUSTRY  
■ MONTANA + MILES CITY REGION

Figure 2.57

### INCOME -- MILES CITY REGION



### INCOME -- MILES CITY REGION



## The Missoula Region

Located in western Montana, the Missoula Region includes Mineral, Missoula, and Ravalli counties.

### Labor Force

In 1986, the Missoula Region ranked third in the state for both total and wage/salary jobs. Approximately 80 percent of the jobs were located in Missoula County, which also ranked third for total jobs among Montana's counties (Table 2.40). The region's 51,600 jobs accounted for 12.7 percent of the state's total in 1986, up from 10.4 percent in 1969.

Comparing Figure 2.58 and Figure 2.9, it is obvious that job growth in the Missoula Region has followed job growth statewide closely. The 1970s experienced exceptionally strong growth, with jobs declining only in 1975 when the nation experienced a recession and Montana suffered from economic stagnation. The 1980 recession, however, began a downward turn in jobs that continued for the next several years. Beginning in 1983, growth returned to the Missoula Region and continued through 1987 (Table 2.40).

Figure 2.58 also illustrates the importance of self-employment to the Missoula Region, particularly in recent years. For example, between 1984 and 1986, wage/salary jobs exhibited virtually no growth. But during these years, total jobs continued to grow because of strong performance in self-employment. In 1986, self-employment accounted for 23 percent of jobs in the region, somewhat below the state average of 26 percent, but well above the 1969 level of 15 percent. Furthermore, the growth rate for the self-employed between 1979 and 1986 was 35 percent, compared to the overall decline of 2 percent in wage/salary jobs (Table 2.5).

The regional economy differs from the rest of the state primarily because of the importance of manufacturing (mainly the lumber/wood products industry). Though down from a figure of 18 percent in 1969, manufacturing accounted for 13 percent of wage/salary jobs in 1986, much higher than the statewide average of 7 percent. Other important sectors include services, retail trade, and government (particularly the University of Montana in Missoula).

Wage/salary jobs increased in nearly every major sector during the 1970s. Agriculture grew because its self-employed component increased. State/local government, eating/drinking places, building construction, private health services, lumber/wood products manufacturing, wholesale trade, business services, trucking, and banking all experienced exceptional growth as total wage/salary employment grew by 56 percent.

Between 1979 and 1986, however, the region witnessed a small net decline in wage/salary jobs (although growth in self-employment was sufficient to keep total jobs growing). For sectors experiencing strong growth in the 1970s, growth continued for private health services, eating/drinking places, trucking, and business services. Other growing sectors included food stores and private social services. Lumber/wood products, building construction,

federal/state government, and wholesale trade each lost wage/salary jobs. Declines also were experienced by the automobile dealer/service station, food processing, and communications sectors. As Figure 2.58 illustrates, however, the overall decline in wage/salary jobs was reversed in 1983, and by 1986 wage/salary jobs almost achieved their previous peak in 1979.

Recovery was evident in 1986-1987 when wage/salary jobs posted a strong increase of 684 jobs (Table 2.41). Large declines in local/state government, heavy construction contractors, and lumber/wood products were more than offset by gains elsewhere. Growth was particularly strong in services (especially in private health and social services), retail trade, and finance/insurance/real estate (excluding banks).

The relatively low regional unemployment rate of 6.9 percent in 1987 ranked fifth in the state. As Figure 2.60 shows, this rate was lower than the statewide average, and much lower than previous levels in the 1980s. Also, 1987 was basically the first year that regional unemployment was lower than unemployment statewide. Past high unemployment rates generally were attributed to year-to-year volatility and seasonality in the lumber/wood products industry. Thus, the declining share of lumber/wood products in total jobs as well as the strong performance of the other economic sectors partially explains the declining unemployment rates of recent years.

### **Population**

A population of over 107,000 in 1987 made the Missoula Region the state's third largest. Most of the population was located in Missoula County, the second most populous county in the state. Although early population growth stagnated from 1910 to 1930, growth was strong in the following decades (Table 2.8). Population growth between 1969 and 1986 was especially strong, (Figure 2.59), and the region's growth rate of 44 percent was one of the state's highest. Between 1986 and 1987, however, population stagnated in the region, while declining statewide.

Population in the Missoula Region closely followed trends at the state level between 1969 and 1986 (Figures 2.10 and 2.59). More significantly, however, population also followed trends in the region's total jobs, with a lag time of about one year (Figures 2.58 and 2.59). When jobs declined slightly between 1974 and 1975, population growth slowed with no appreciable lag. By the 1980 recession, though, when total jobs once again declined, a lag of one year occurred with population growth slowing in 1981 before turning negative in 1982. Jobs growth resumed in 1983, accompanied by slight population growth in 1983 and strong growth through 1986.

### **Income**

As with jobs and population, the Missoula Region ranked third statewide in total personal income in 1986 (Table 2.40). Ranks for income components were similar, with the exception of farm earnings, which ranked 11th and accounted for a very small share of total income.

Because regional farm earnings were so small, their effect on total personal income also was minimal. As a result, changes in total personal income closely followed corresponding changes in nonfarm earnings throughout the 1979-1987 period (Figure 2.61).

A sharp decline in nonfarm jobs between 1979 and 1982 produced a similar decline in nonfarm earnings during the national recession. Post-recession recovery was strong in both total income and nonfarm earnings in 1983 and 1984, but during the Montana recession in 1985, nonfarm earnings stagnated. Total personal income did increase very slightly between 1984 and 1987, however, as transfer payments and farm earnings posted modest gains. Overall, total personal income grew by only 2.7 percent between 1979 and 1986, slightly less than the Montana average of 3 percent.

The Missoula Region ranked eighth in the state in per capita income for the 1982-1986 period, and remained below the state average for every year in this period (Table 2.40). For a few years, Missoula County was slightly higher than the state in per capita income, but both Ravalli and Mineral counties were consistently below the Montana average. After declining from over \$12,200 in 1979, per capita income in 1984 leveled at \$11,700 and remained there through 1987.

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Figure 2.58

### EMPLOYMENT--MISSOULA REGION

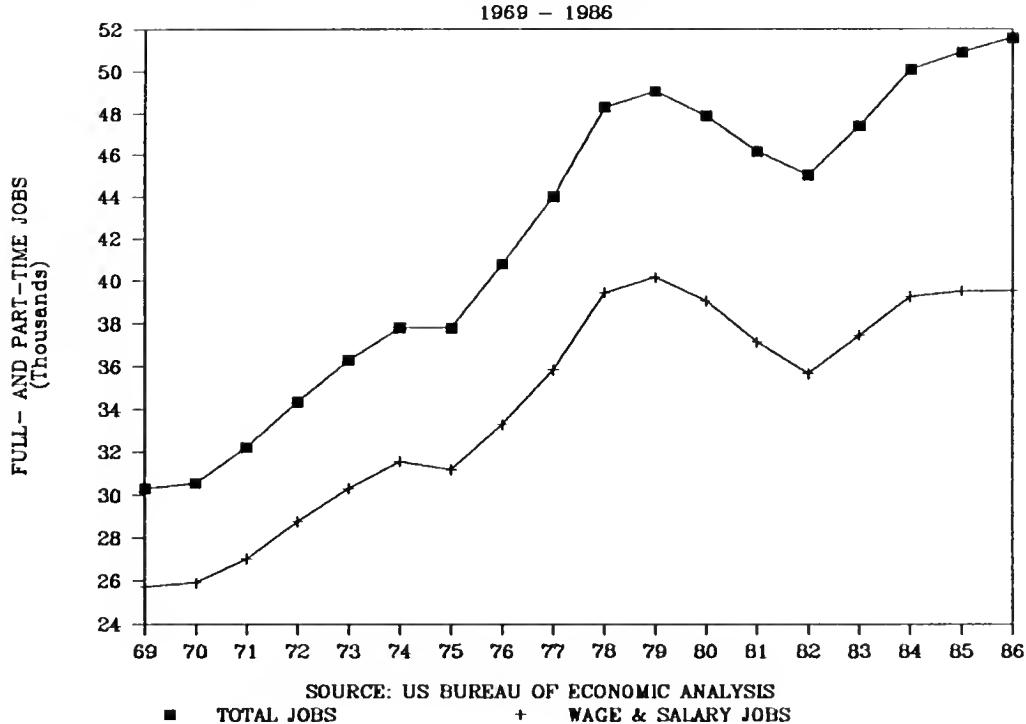


Figure 2.59

### POPULATION--MISSOULA REGION

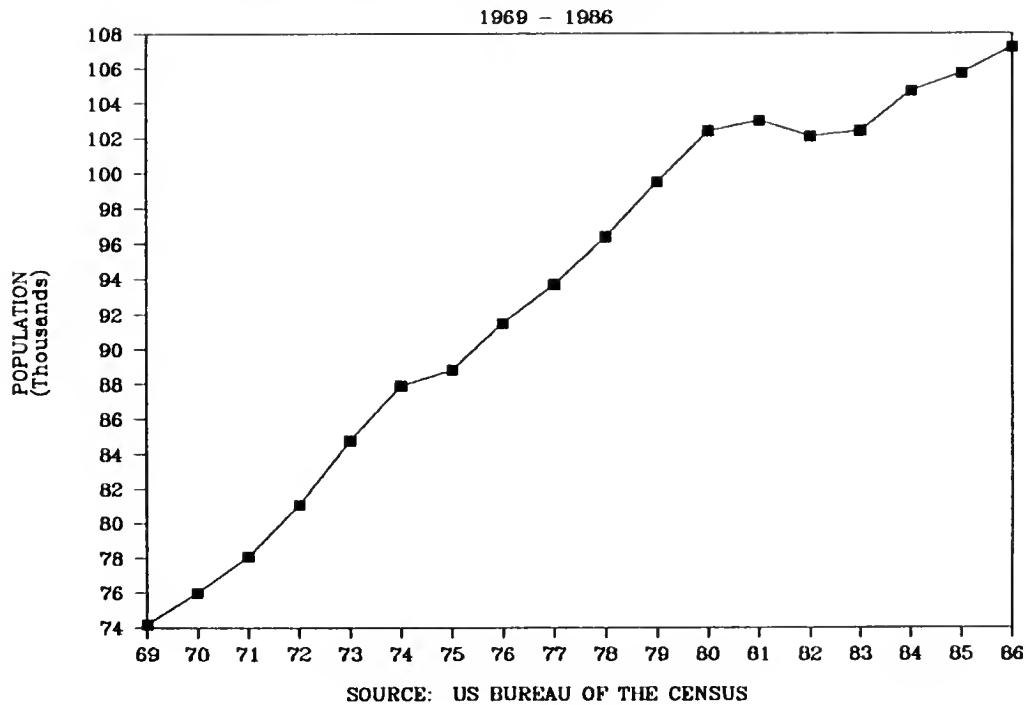


Table 2.40

|                                           | The Missoula Region |         |           |           |           |           |           |           |           |           |           | Rank in State /d   |
|-------------------------------------------|---------------------|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------------|
|                                           | 1959                | 1969    | 1979      | 1980      | 1981      | 1982      | 1983      | 1984      | 1985      | 1986      | 1987 /p   | (Region or County) |
| <b>Population /a</b>                      |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 59,500              | 74,200  | 99,500    | 102,400   | 103,000   | 102,100   | 102,400   | 104,700   | 105,700   | 107,200   | 107,100   | 3                  |
| Mineral                                   | 3,000               | 3,000   | 3,700     | 3,700     | 3,600     | 3,500     | 3,500     | 3,700     | 3,700     | 3,600     | 3,500     | 58                 |
| Missoula                                  | 44,500              | 57,000  | 74,100    | 76,100    | 76,200    | 75,100    | 75,100    | 76,500    | 77,300    | 78,600    | 78,400    | 2                  |
| Ravalli                                   | 12,200              | 14,200  | 21,700    | 22,600    | 23,200    | 23,500    | 23,800    | 24,500    | 24,700    | 25,000    | 25,200    | 8                  |
| <b>Total Jobs /b</b>                      |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 30,507  | 49,061    | 47,896    | 46,163    | 45,036    | 47,406    | 50,093    | 50,902    | 51,593    | ...       | 3                  |
| Mineral                                   | ...                 | 1,245   | 1,614     | 1,556     | 1,526     | 1,383     | 1,595     | 1,675     | 1,605     | 1,541     | ...       | 41                 |
| Missoula                                  | ...                 | 24,279  | 39,984    | 38,967    | 37,066    | 36,168    | 37,871    | 40,074    | 40,828    | 41,373    | ...       | 3                  |
| Ravalli                                   | ...                 | 4,783   | 7,463     | 7,575     | 7,571     | 7,485     | 7,940     | 8,344     | 8,469     | 8,679     | ...       | 9                  |
| <b>Wage &amp; Salary Jobs /b</b>          |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 25,736  | 40,152    | 39,053    | 37,128    | 35,659    | 37,444    | 39,260    | 39,515    | 39,533    | ...       | 3                  |
| Mineral                                   | ...                 | 1,066   | 1,254     | 1,194     | 1,162     | 1,016     | 1,195     | 1,264     | 1,177     | 1,096     | ...       | 38                 |
| Missoula                                  | ...                 | 21,528  | 34,032    | 33,099    | 31,120    | 29,949    | 31,325    | 32,885    | 33,195    | 33,228    | ...       | 3                  |
| Ravalli                                   | ...                 | 3,142   | 4,866     | 4,760     | 4,846     | 4,694     | 4,924     | 5,111     | 5,143     | 5,211     | ...       | 11                 |
| <b>Unemployment Rate /c</b>               |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | ...                 | 5.2%    | 6.6%      | 8.2%      | 9.7%      | 10.8%     | 9.3%      | 7.5%      | 8.0%      | 8.0%      | 6.9%      | 5                  |
| Mineral                                   | ...                 | 6.2%    | 7.5%      | 10.2%     | 12.6%     | 22.5%     | 15.3%     | 12.8%     | 14.5%     | 15.0%     | 10.5%     | 51                 |
| Missoula                                  | ...                 | 4.7%    | 6.4%      | 7.6%      | 9.2%      | 9.2%      | 8.0%      | 6.4%      | 7.1%      | 7.2%      | 6.2%      | 20                 |
| Ravalli                                   | ...                 | 6.7%    | 7.6%      | 10.3%     | 11.1%     | 14.6%     | 13.3%     | 10.5%     | 10.3%     | 10.1%     | 8.9%      | 42                 |
| <b>Total Personal Income (\$1000s) /b</b> |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 457,430             | 685,906 | 1,217,862 | 1,188,895 | 1,151,039 | 1,130,255 | 1,172,358 | 1,220,575 | 1,232,801 | 1,250,531 | 1,251,000 | 3                  |
| Mineral                                   | 16,101              | 25,083  | 36,888    | 34,259    | 34,525    | 31,719    | 36,078    | 36,685    | 35,745    | 34,359    | ...       | 43                 |
| Missoula                                  | 359,258             | 527,916 | 950,248   | 925,933   | 886,221   | 872,566   | 898,863   | 957,886   | 945,017   | 957,082   | ...       | 3                  |
| Ravalli                                   | 82,070              | 112,907 | 230,727   | 228,703   | 230,293   | 225,949   | 237,417   | 246,004   | 252,041   | 259,090   | ...       | 8                  |
| <b>Per Capita Personal Income /b</b>      |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 7,688               | 8,977   | 12,236    | 11,611    | 11,178    | 11,060    | 11,436    | 11,659    | 11,660    | 11,661    | 11,700    | 8                  |
| Mineral                                   | 5,367               | 8,464   | 9,898     | 9,381     | 9,723     | 8,965     | 10,197    | 9,966     | 9,755     | 9,494     | ...       | 48                 |
| Missoula                                  | 8,110               | 9,266   | 12,826    | 12,168    | 11,624    | 11,615    | 11,963    | 12,265    | 12,222    | 12,171    | ...       | 18                 |
| Ravalli                                   | 6,727               | 7,951   | 10,625    | 10,101    | 9,936     | 9,602     | 9,961     | 10,025    | 10,187    | 10,367    | ...       | 43                 |
| <b>Nonfarm Earnings (\$1000s) /b</b>      |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 341,250             | 524,809 | 915,313   | 866,632   | 800,522   | 762,281   | 812,554   | 848,526   | 848,196   | 848,657   | 853,000   | 3                  |
| Mineral                                   | 11,935              | 19,563  | 26,589    | 23,153    | 23,399    | 18,703    | 26,721    | 25,583    | 23,099    | 21,769    | ...       | 37                 |
| Missoula                                  | 287,710             | 441,093 | 782,001   | 745,831   | 681,518   | 652,876   | 690,229   | 720,583   | 719,968   | 719,161   | ...       | 2                  |
| Ravalli                                   | 41,585              | 64,172  | 106,923   | 99,647    | 95,606    | 90,702    | 97,604    | 102,561   | 105,149   | 107,727   | ...       | 11                 |
| <b>Farm Earnings (\$1000s) /b</b>         |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 19,094              | 8,846   | 10,951    | 10,170    | 5,058     | 2,109     | 3,268     | 4,977     | 5,455     | 12,817    | 14,000    | 11                 |
| Mineral                                   | 906                 | 122     | 599       | 465       | 388       | 378       | 481       | 494       | 634       | 729       | ...       | 55                 |
| Missoula                                  | 6,400               | 2,475   | 4,540     | 4,080     | 1,950     | 1,058     | 1,978     | 2,326     | 2,049     | 4,359     | ...       | 40                 |
| Ravalli                                   | 11,787              | 6,249   | 5,811     | 5,625     | 2,720     | 674       | 809       | 2,157     | 2,771     | 7,729     | ...       | 24                 |
| <b>Property Income (\$1000s) /b</b>       |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 65,525              | 90,415  | 191,599   | 195,083   | 206,760   | 218,857   | 209,787   | 223,738   | 226,732   | 227,623   | 221,000   | 4                  |
| Mineral                                   | 1,417               | 2,049   | 5,727     | 3,676     | 3,980     | 4,206     | 3,871     | 4,003     | 4,589     | 4,673     | ...       | 52                 |
| Missoula                                  | 48,473              | 67,433  | 132,506   | 134,861   | 140,702   | 150,727   | 141,103   | 152,702   | 154,554   | 155,567   | ...       | 3                  |
| Ravalli                                   | 15,635              | 20,933  | 55,366    | 56,546    | 62,078    | 63,904    | 64,814    | 67,055    | 67,588    | 67,382    | ...       | 8                  |
| <b>Transfer Payments (\$1000s) /b</b>     |                     |         |           |           |           |           |           |           |           |           |           |                    |
| Region                                    | 44,311              | 73,664  | 169,970   | 185,266   | 194,628   | 201,945   | 206,812   | 210,259   | 220,269   | 228,702   | 230,000   | 4                  |
| Mineral                                   | 1,990               | 3,081   | 6,382     | 7,260     | 7,433     | 9,131     | 8,366     | 8,122     | 8,542     | 8,649     | ...       | 38                 |
| Missoula                                  | 32,439              | 53,268  | 122,200   | 152,555   | 157,741   | 141,014   | 144,701   | 145,918   | 152,887   | 159,629   | ...       | 3                  |
| Ravalli                                   | 9,662               | 17,316  | 41,408    | 45,431    | 49,455    | 51,801    | 53,745    | 56,219    | 58,840    | 60,423    | ...       | 8                  |

/a U.S. Bureau of the Census      /b U.S. Bureau of Economic Analysis. Dollars are inflated to constant 1987 dollars.

/c Research and Analysis Bureau, Montana Department of Labor and Industry. Unemployment rates in the 1969 column are from 1970.

/d Rank for 1986 data, except Unemployment Rate (1987 data) and Per Capita Income (1982-1986 average).

/p 1987 data consists of preliminary estimates.

Table 2.41 WAGE &amp; SALARY EMPLOYMENT IN THE MISSOULA REGION\*: 1986-1987

| INDUSTRY                                            | SIC**<br>CODE | 1986   | 1987   | CHANGE | PERCENT<br>CHANGE |
|-----------------------------------------------------|---------------|--------|--------|--------|-------------------|
| Total Wage and Salary Employment                    |               | 34,721 | 35,405 | 684    | 2.0%              |
| Total Private                                       |               | 27,230 | 28,010 | 780    | 2.9%              |
| Agriculture, Forestry, Fishing, Hunting, & Trapping |               | 255    | "0"    | "0"    | "0"               |
| Agricultural Production--Crops ***                  | 01            | 18     | 20     | 2      | 11.1%             |
| Agricultural Production--Livestock ***              | 02            | 53     | 51     | (2)    | -3.8%             |
| Agricultural Services                               | 07            | 110    | 124    | 14     | 12.7%             |
| Forestry                                            | 08            | 70     | 61     | (9)    | -12.9%            |
| Fishing, Hunting, and Trapping                      | 09            |        | "0"    | "0"    | "0"               |
| Mining                                              |               | "0"    | 23     | "0"    | "0"               |
| Metal Mining                                        | 10            | 5      | 12     | 7      | 140.0%            |
| Coal Mining                                         | 12            |        |        |        |                   |
| Oil and Gas Extraction                              | 13            | "0"    |        | "0"    | "0"               |
| Mining of Non-Metallic Minerals, Except Fuels       | 14            | 48     | 11     | (37)   | -77.1%            |
| Construction                                        |               | 1,294  | 1,194  | (100)  | -7.7%             |
| General Building Contractors                        | 15            | 327    | 379    | 52     | 15.9%             |
| Heavy Construction Contractors                      | 16            | 285    | 151    | (134)  | -47.0%            |
| Special Trade Contractors                           | 17            | 679    | 663    | (16)   | -2.4%             |
| Manufacturing                                       |               | 4,878  | 4,923  | 45     | 0.9%              |
| Food and Kindred Products                           | 20            | 270    | 296    | 26     | 9.6%              |
| Textile Mill Products                               | 22            | "0"    |        | "0"    | "0"               |
| Apparel and Other Textile Products                  | 23            | 61     | 42     | (19)   | -31.1%            |
| Lumber and Wood Products                            | 24            | 2,812  | 2,716  | (96)   | -3.4%             |
| Furniture and Fixtures                              | 25            | 147    | 142    | (5)    | -3.4%             |
| Paper and Allied Products                           | 26            | "0"    | "0"    | "0"    | "0"               |
| Printing and Publishing                             | 27            | 312    | 317    | 5      | 1.6%              |
| Chemicals and Allied Products                       | 28            | 30     | 32     | 2      | 6.7%              |
| Petroleum Refining and Related Industries           | 29            |        |        |        |                   |
| Rubber and Miscellaneous Plastic Products           | 30            | "0"    | "0"    | "0"    | "0"               |
| Leather and Leather Products                        | 31            | "0"    |        | "0"    | "0"               |
| Stone, Clay, Glass, and Concrete Products           | 32            | 66     | 80     | 14     | 21.2%             |
| Primary Metals Processing                           | 33            | "0"    |        | "0"    | "0"               |
| Fabricated Metal Products                           | 34            | 126    | 100    | (26)   | -20.6%            |
| Machinery, Except Electrical                        | 35            | 32     | 105    | 73     | 228.1%            |
| Electrical and Electronic Equipment                 | 36            | 15     | "0"    | "0"    | "0"               |
| Transportation Equipment                            | 37            | "0"    | "0"    | "0"    | "0"               |
| Instruments and Related Products                    | 38            | 117    | 117    | 0      | 0.0%              |
| Miscellaneous Manufacturing Industries              | 39            | 112    | 207    | 95     | 84.0%             |
| Transportation and Public Utilities                 |               | 2,222  | 2,244  | 22     | 1.0%              |
| Local and Interurban Passenger Transit              | 41            | 132    | 168    | 36     | 27.1%             |
| Trucking and Warehousing                            | 42            | 1,192  | 1,154  | (38)   | -3.2%             |
| Water Transportation                                | 44            |        |        |        |                   |
| Transportation by Air                               | 45            | 83     | 121    | 38     | 45.8%             |
| Pipelines, Except Natural Gas                       | 46            |        |        |        |                   |
| Transportation Services                             | 47            | 88     | 95     | 7      | 8.0%              |
| Communications                                      | 48            | 402    | 385    | (17)   | -4.2%             |
| Electric, Gas, and Sanitary Services                | 49            | 319    | 316    | (3)    | -0.9%             |
| Wholesale Trade                                     |               | 1,546  | 1,542  | (4)    | -0.3%             |
| Durable Goods                                       | 50            | 871    | 934    | 63     | 7.2%              |
| Non-durable Goods                                   | 51            | 673    | 608    | (65)   | -9.7%             |
| Retail Trade                                        |               | 7,587  | 7,806  | 219    | 2.9%              |
| Building Materials and Hardware                     | 52            | 260    | 259    | (1)    | -0.4%             |
| General Merchandise Stores                          | 53            | 759    | 855    | 96     | 12.6%             |
| Food Stores                                         | 54            | 1,097  | 1,094  | (3)    | -0.3%             |
| Automotive Dealers and Service Stations             | 55            | 937    | 972    | 35     | 3.7%              |
| Apparel and Accessory Stores                        | 56            | 352    | 361    | 9      | 2.6%              |
| Furniture and Home Furnishings Stores               | 57            | 286    | 295    | 9      | 3.1%              |
| Eating and Drinking Places                          | 58            | 2,868  | 2,904  | 36     | 1.3%              |
| Miscellaneous Retail                                | 59            | 1,019  | 1,057  | 38     | 3.7%              |
| Finance, Insurance, and Real Estate                 |               | 1,436  | 1,533  | 97     | 6.8%              |
| Banking                                             | 60            | 520    | 503    | (17)   | -3.3%             |
| Credit Agencies other than Banks                    | 61            | 278    | 285    | 7      | 2.5%              |
| Security, Commodity Brokers, and Services           | 62            | 60     | 65     | 5      | 8.3%              |
| Insurance Carriers                                  | 63            | 35     | 44     | 9      | 25.7%             |
| Insurance Agents, Brokers, and Services             | 64            | 228    | 231    | 3      | 1.3%              |
| Real Estate                                         | 65            | 289    | 308    | 19     | 6.6%              |
| Combined Real Estate, Insurance, Etc.               | 66            | 15     | 17     | 2      | 13.3%             |
| Holding and Other Investment Offices                | 67            | 3      | 74     | 71     | 2366.7%           |
| Services                                            |               | 7,940  | 8,466  | 528    | 6.6%              |
| Hotels and Other Lodging Places                     | 70            | 728    | 738    | 10     | 1.4%              |
| Personal Services                                   | 72            | 377    | 389    | 12     | 3.2%              |
| Business Services                                   | 73            | 920    | 918    | (2)    | -0.2%             |
| Auto Repair, Services, and Garages                  | 75            | 362    | 358    | (4)    | -1.1%             |
| Miscellaneous Repair Services                       | 76            | 183    | 252    | 69     | 37.7%             |
| Motion Pictures                                     | 78            | 64     | 56     | (8)    | -12.5%            |
| Amusement and Recreation Services                   | 79            | 342    | 401    | 59     | 17.3%             |
| Private Health Services                             | 80            | 3,375  | 3,492  | 117    | 3.5%              |
| Legal Services                                      | 81            | 305    | 328    | 23     | 7.5%              |
| Private Educational Services                        | 82            | 71     | 84     | 13     | 18.3%             |
| Private Social Services                             | 83            | 575    | 731    | 156    | 27.1%             |
| Museums, Art Galleries, Etc.                        | 84            |        |        |        |                   |
| Membership Organizations Including Tribal Gov't     | 86            | 232    | 297    | 65     | 28.0%             |
| Private Households                                  | 88            | 47     | 61     | 14     | 29.8%             |
| Engineering, Accounting, and Other Services         | 89            | 344    | 347    | 3      | 0.9%              |
| Non-Classifiable                                    | 99            | "0"    | "0"    | "0"    | "0"               |
| Government                                          |               | 7,491  | 7,393  | (98)   | -1.3%             |
| State                                               |               | 2,189  | 2,139  | (50)   | -2.3%             |
| Local                                               |               | 3,565  | 3,467  | (98)   | -2.7%             |
| Federal                                             |               | 1,735  | 1,785  | 50     | 2.9%              |

\*Includes only employment covered by the Unemployment Insurance Program.

\*\*Standard Industrial Classification

\*\*\*These values represent a very small portion of wage/salary employment for this industry.

\*D\* indicates employment is suppressed to protect individual firm confidentiality.

E preceding a number indicates that the value does not include employment that is suppressed.

Source: Research and Analysis Bureau, Montana Department of Labor and Industry. Prepared with minor adjustments by the Office of Research and Information Services, Montana Department of Commerce, 1988.

Figure 2.60

## UNEMPLOYMENT RATE—MISSOULA REGION

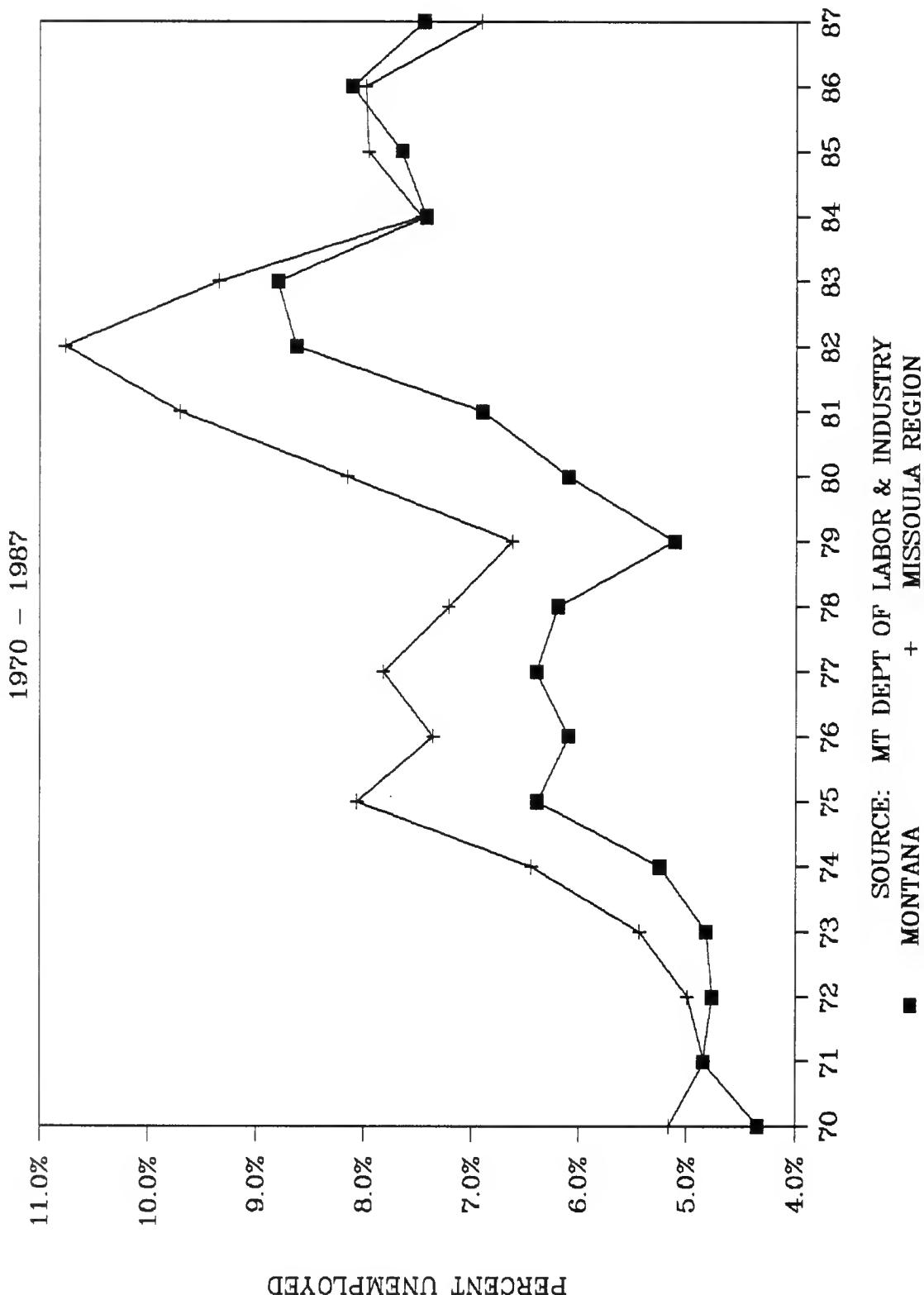
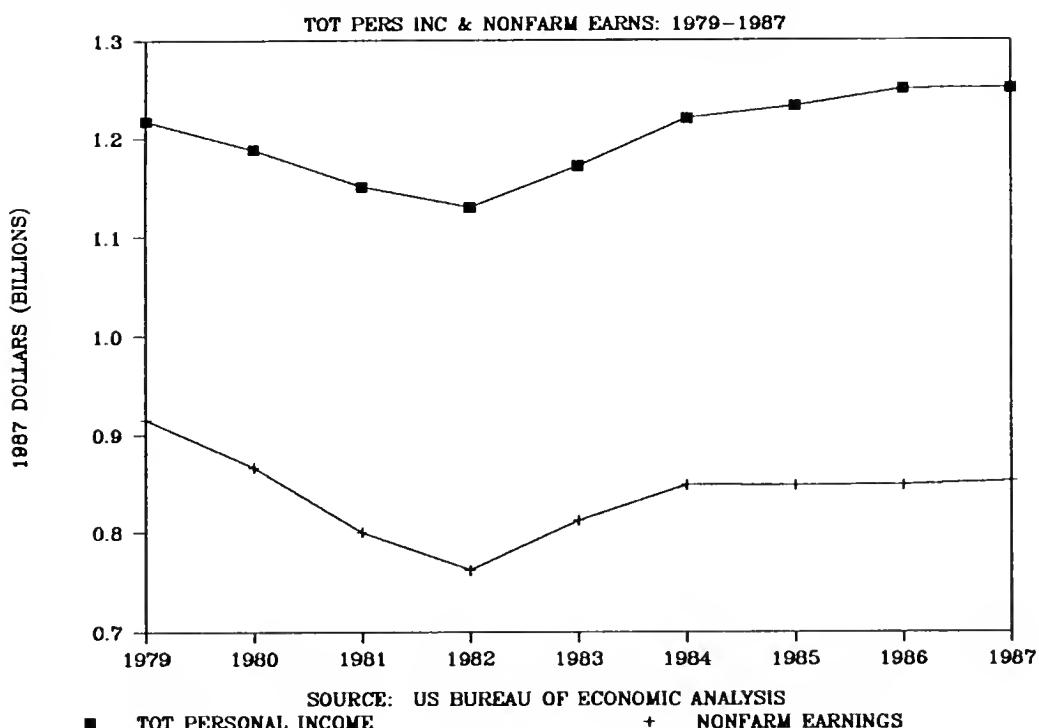
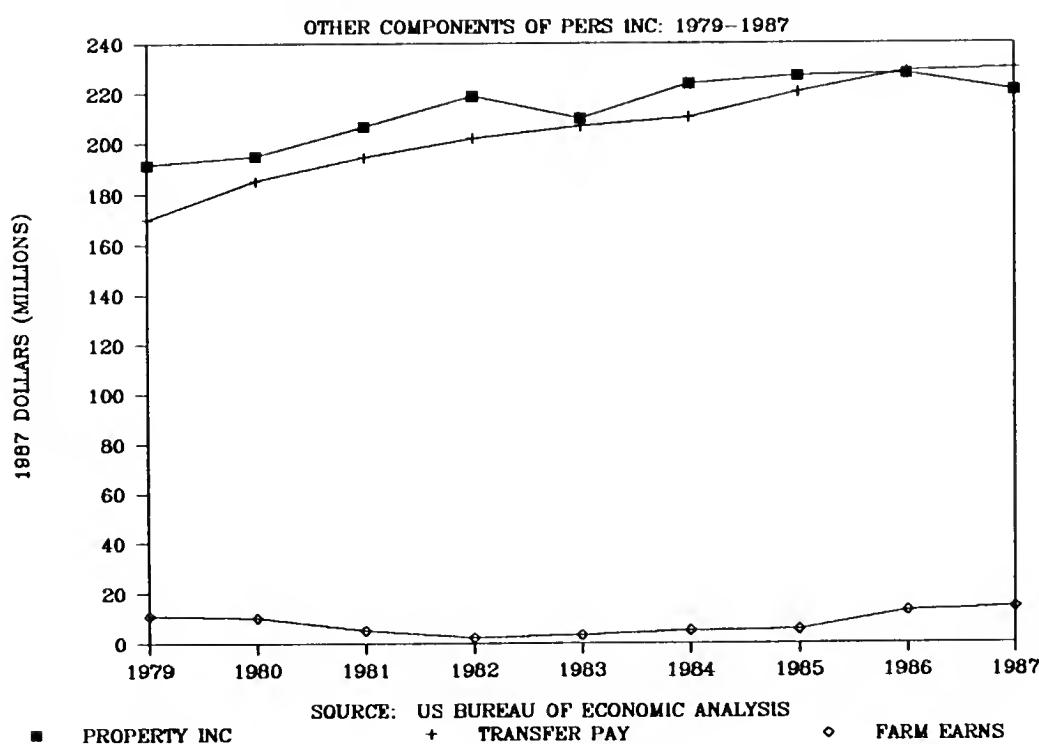


Figure 2.61

### INCOME -- MISSOULA REGION



### INCOME -- MISSOULA REGION



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